JD Edwards World
Configuration Management Guide

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Contents

1 Overview

Overview to Configuration Management ....................................................... 1-1
  System Integration .......................................................................................... 1-2
  Terms and Concepts ....................................................................................... 1-5
  Features ......................................................................................................... 1-6
  Tables ............................................................................................................ 1-7
  Menu Overview .............................................................................................. 1-8
  Example Multi-Level Configured Item ......................................................... 1-9

2 Setup

Overview to Configuration Management Setup ......................................... 2-1
  About Configuration Management Setup .................................................... 2-1

Set Up Item Information .............................................................................. 2-3
  Setting Up Item Information ......................................................................... 2-3
  Entering Item Master Information ............................................................... 2-3
  Entering Branch/Plant Information ............................................................... 2-8
  Entering a Routing ......................................................................................... 2-12

Set Up Configurator Smart Parts ................................................................. 2-15
  About Smart Parts ......................................................................................... 2-15
  Setting Up Smart Parts ................................................................................ 2-17

Set Up Distribution Information ................................................................. 2-19
  Setting Up Distribution Information ............................................................ 2-19
  Setting Up Line Types .................................................................................. 2-19
  Setting Up Order Activity Rules ................................................................. 2-21
  Setting Up Price Information ...................................................................... 2-23
  Setting Up Pricing Groups .......................................................................... 2-25
  Setting Up Discounting Information ......................................................... 2-27

Set Up Constants ......................................................................................... 2-31
  Setting Up Constants .................................................................................... 2-31
# Set Up Segments

- Setting Up Segments ................................................................. 2-35
- Defining a Segment ........................................................................ 2-36
- Setting Up User Defined Codes ...................................................... 2-41
- Locating Segment Information ....................................................... 2-44
- Comparing Segment Values ......................................................... 2-45

# Set Up Cross-Segment Editing Rules

- Setting Up Cross-Segment Editing Rules ........................................ 2-51
- Setting Up Cross-Segment Logic ..................................................... 2-52
- Setting Up Custom Error Messages .............................................. 2-61
- Reviewing Cross-Segment Editing Information .............................. 2-61

# Understand Derived Calculations

- About Derived Calculations ......................................................... 2-63
- Algebraic Formulas ........................................................................ 2-63
- Segment References ...................................................................... 2-64
- Trigonometric and Logarithmic Functions .................................... 2-64
- Substrings ................................................................................... 2-65
- Concatenations ............................................................................. 2-65
- Referencing External Fields ........................................................... 2-65
- Referencing External Programs ..................................................... 2-66
- Calculating Smart Parts ................................................................. 2-66

# Set Up Assembly Inclusion Rules

- Setting Up Assembly Inclusion Rules .......................................... 2-69
- Defining Assembly Inclusion Rules .............................................. 2-73
- Locating Assembly Inclusion Rules .............................................. 2-84

# Set Up the Configurator Subsystem

- Setting Up the Subsystem ............................................................... 2-87

# Understand Tables

- About Tables ................................................................................ 2-91

# Set Up Tables

- About Tables ................................................................................ 2-95
- Setting Up Tables ........................................................................ 2-96
- Setting Up Table Dimensions ...................................................... 2-96
- Setting Up Configured Item Cross-Reference ............................... 2-99
- Setting Up Table Values ............................................................... 2-100
- Linking a Table to an Assembly Inclusion Rule ............................ 2-104
- Printing Table Information ............................................................ 2-105
<table>
<thead>
<tr>
<th>Print Reports</th>
<th>2-107</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printing Reports</td>
<td>2-107</td>
</tr>
<tr>
<td>Printing Segment Information</td>
<td>2-107</td>
</tr>
<tr>
<td>Printing Cross-Segment Editing Rules</td>
<td>2-108</td>
</tr>
<tr>
<td>Printing Assembly Inclusion Rules</td>
<td>2-109</td>
</tr>
</tbody>
</table>

### 3 Sales Orders

<table>
<thead>
<tr>
<th>Overview to Configured Item Sales Orders</th>
<th>3-1</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Sales Orders</td>
<td>3-1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work with Configured Item Sales Orders</th>
<th>3-3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working with Configured Item Sales Orders</td>
<td>3-3</td>
</tr>
<tr>
<td>Entering a Sales Order in Text Mode</td>
<td>3-4</td>
</tr>
<tr>
<td>Entering a Sales Order in Assisted Mode</td>
<td>3-6</td>
</tr>
<tr>
<td>Entering a Sales Order in Assisted Prompt Mode</td>
<td>3-9</td>
</tr>
<tr>
<td>Working with Error Messages</td>
<td>3-13</td>
</tr>
<tr>
<td>Reviewing Configured Text</td>
<td>3-14</td>
</tr>
<tr>
<td>Revising a Sales Order for a Configured Item</td>
<td>3-15</td>
</tr>
<tr>
<td>Converting Sales Quotes for Configured Items</td>
<td>3-17</td>
</tr>
</tbody>
</table>

### 4 Configured Items

<table>
<thead>
<tr>
<th>Overview to Configured Items</th>
<th>4-1</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Configured Items</td>
<td>4-1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Process Work Orders</th>
<th>4-3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing Work Orders</td>
<td>4-3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work with Configured String History</th>
<th>4-7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working with Configured String History</td>
<td>4-7</td>
</tr>
<tr>
<td>Generating the Configured String History</td>
<td>4-7</td>
</tr>
<tr>
<td>Reviewing the Configured String History</td>
<td>4-7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Understand Configured Items and Manufacturing</th>
<th>4-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Configured Items and Manufacturing</td>
<td>4-11</td>
</tr>
<tr>
<td>Reviewing Hours and Quantities</td>
<td>4-11</td>
</tr>
<tr>
<td>Working With Manufacturing Accounting and Product Costing</td>
<td>4-13</td>
</tr>
<tr>
<td>Working with Work Order Completions</td>
<td>4-14</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Understand Configured Items and Distribution</th>
<th>4-15</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Configured Items and Distribution</td>
<td>4-15</td>
</tr>
<tr>
<td>Working with Configured Item Inventory</td>
<td>4-15</td>
</tr>
</tbody>
</table>
Contents

Checking Availability ........................................................................................................ 4-19
Working with Pick Lists .................................................................................................. 4-22
Working with Shipments ................................................................................................. 4-23
Working with Invoices .................................................................................................... 4-24

Understand Kit Pricing in Configured Items ............................................................... 4-27

5 Processing Options

Setup Processing Options ............................................................................................... 5-1

- Branch/Plant Item Information (P41026) ................................................................. 5-1
- Manufacturing Data (P41027) .................................................................................. 5-2
- Routing Master Revisions (P3003) .......................................................................... 5-2
- Customer/Item/Order Detail Group (P4092) .............................................................. 5-3
- Assembly Inclusion Rules (P3293) .......................................................................... 5-3
- Rule Table Definition (P3281) ................................................................................. 5-3
- Configured Item Cross-Reference (P3282) .............................................................. 5-4
- Table Detail (P3283) ............................................................................................... 5-4
- Rules Table Print (P3283P) ..................................................................................... 5-4

Sales Orders Processing Options .................................................................................. 5-5

- Sales Order Entry (P4211) ....................................................................................... 5-5

Configured Items Processing Options ......................................................................... 5-15

- Generate and Print Configured Work Orders (Subsystem) (P31410) .... 5-15
- Work Order Time Entry (P311221) ........................................................................ 5-20

6 Appendices

Appendix A - Functional Servers .................................................................................. 6-1

- About Functional Servers ....................................................................................... 6-1
1 Overview
Overview to Configuration Management

Many manufacturers sell products that are an arrangement of components that a customer orders. In this environment, a manufacturer assembles a large variety of end products from relatively few components. When customers place orders, they specify features and options about the product.

When you enter a sales order for a configured item, a series of forms appear within which you answer questions about the item's segments (features and options). The system verifies each segment value against user defined information, such as rules and user defined code tables of choices. If the configuration is valid, the system processes the order.

Although setup for Configuration Management can be complex, there are many benefits. During setup you must define the following information:

- Constants
- Segments
- Cross-segment editing rules
- Assembly inclusion rules

However, as a result of using Configuration Management, you can:

- Use fewer end part numbers
- Create dynamic work order parts lists and routings
- Provide for order history and configuration audit trails
- Improve order accuracy
- Shorten lead times
- Provide better margin information
- Improve customer service

Examples of manufacturers who typically use Configuration Management include:

- Furniture and fixtures
- Paper products
- Building products
- Commercial printing
- Control and measurement equipment
- Transportation equipment
- Windows and doors
- Other dimensional products
System Integration

The Configuration Management system works with other JD Edwards World systems to generate the following for configured items:

- Sales orders
- Parts lists
- Routings
- Work orders
- Price information
- Work order costing
- Invoices
JD Edwards World also offers kit processing that enables feature and option processing. However, kit processing might not be appropriate for features or complex specifications, such as conditional part requirements. The Configuration Management system is appropriate for items that:

- Are complex
- Require routings that change based on features or options
- Include features that are not compatible with other features
- Require multiple work orders to define an assembly
Enterprise Requirements Planning and Execution Review

Configuration Management is one of many systems in the Enterprise Requirements Planning and Execution system.

Use the Enterprise Requirements Planning and Execution system to coordinate your inventory and labor resources to deliver products according to a managed schedule. It is a closed-loop manufacturing system that formalizes company and operations planning, and the implementation of those plans. The Enterprise Requirements Planning and Execution system includes the following JD Edwards World systems.
# Terms and Concepts

<table>
<thead>
<tr>
<th>Term/Concept</th>
<th>Description</th>
</tr>
</thead>
</table>
| Configured item               | A configured item is comprised of different features requested by a customer, for example, a forklift. You associate segments with the configured item. For example, the configured item FORKLIFT-A contains the following segments:  
  FORKLIFT-A  
  - Segment 10 (Lift Rating)  
  - Segment 20 (Power Type)  
  - Segment 30 (Boom Height) |
| Segment                       | When you set up a configured item, you define segments to represent characteristics of a configured item, such as an optional paint color or a lift rating. For example:  
  Segment 10 (Lift Rating)  
  - 2000 pounds  
  - 4000 pounds  
  - 6000 pounds  
  Segment 40 (Paint)  
  - STANDARD  
  - CUSTOM  
  A segment might also be called a feature or an option. |
| Configured string             | During sales order entry, the system joins the segments and expresses the configuration as a string of segments separated by a delimiter. For example:  
  2000/ PROPANE/ 08/ STD/ 50/ 3587.4659217 |
| Multi-level configured item   | You can set up a configured subassembly within a configured item. For example, the configured item FORKLIFT-A contains a configured subassembly for the item BOOM. |
| Cross-segment editing rules   | Use cross-segment editing rules to establish the relationships between the configured item segments with logic statements. This enables you to avoid invalid combinations and prevent invalid sales orders. The system edits the segments on the sales order against these cross-segment editing rules and error messages appear for information that violates the rules. For example:  
  If segment 10 (Lift Rating) = 6000 pounds, then segment 30 (Boom Height) must = 12 (feet) else segment 30 must be <= 10 (feet). |
### Term/Concept Description

<table>
<thead>
<tr>
<th>Term/Concept</th>
<th>Description</th>
</tr>
</thead>
</table>
| Assembly inclusion rules | Use assembly inclusion rules to translate requested options and values from sales order entry into the specific components, operations, and calculated values necessary to build and price the configured item. For example:  
  If segment 10 = 6000 and segment 30 >= 10, then use part F170, else use part F175. |

### Analyzing Your Configured Items

Before you work with Configuration Management, ensure that you can answer the following questions about your configured items:

- How do customers order the configured item?
- How will the configured item be priced?
- Which components make up the configured items?
- Which routings do the configured items require?
- Which calculations are required to support prices, components, and routing steps?

This information will help you determine the sequence of questions. This is important because you can define levels of questions within multi-level configured items. Knowing this information before you set up this system will save time during setup.

### Features

The Configuration Management system enables you to perform the following functions:

- Specify a variety of features and options with configured item segments
- Establish relationships between options to prevent invalid product configurations
- Define multi-level configured items and multiple associated work orders
- Establish default values or ranges for options and features
- Calculate values for options with algebraic definitions
- Create generic rules that can be used across branch/plants
- Create assembly inclusion rules that control price adjustments, routings, and parts
- Define a table of values that is referenced by assembly inclusion rules
## Tables

The Configuration Management system uses the following tables:

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configured Item Segments (F3291)</td>
<td>Contains the segments for the configured items defined on the Item Master and Branch/Plant.</td>
</tr>
<tr>
<td>Cross-Segment Editing Rules (F3292)</td>
<td>Defines the relationships among the configured items’ segments.</td>
</tr>
<tr>
<td>Configurator Constants (F3209)</td>
<td>Stores constants that you define to control processing at the branch/plant level.</td>
</tr>
<tr>
<td>Values Detail (F32921)</td>
<td>Stores the *VALUES definitions for cross-segment editing rules and assembly inclusion rules.</td>
</tr>
<tr>
<td>Range Detail (F32922)</td>
<td>Stores the *RANGE definitions for cross-segment editing rules and assembly inclusion rules.</td>
</tr>
<tr>
<td>Assembly Inclusion Rules (F3293)</td>
<td>Stores the components, routings, calculations, and price adjustments for configured items.</td>
</tr>
<tr>
<td>Configured String History (F3294)</td>
<td>Stores the history for the configured items of all the configurations ordered.</td>
</tr>
<tr>
<td>Configured String Master (F32941)</td>
<td>Contains the configured string identifier for each configuration.</td>
</tr>
<tr>
<td>Configured String Segments (F32942)</td>
<td>Stores the configured string for each segment.</td>
</tr>
<tr>
<td>Rules Table Definition (F3281)</td>
<td>Stores table information such as description, table type, number of segments and return values.</td>
</tr>
<tr>
<td>Configured Item/Rules Table Cross-Reference (F3282)</td>
<td>Defines which segment values reference tables for each configured item.</td>
</tr>
<tr>
<td>Rules Table Value Definition (F32821)</td>
<td>Defines which segments will be populated with the returned values.</td>
</tr>
<tr>
<td>Table Detail (F3283)</td>
<td>Stores the actual table values for each combination of segment values that you define for the table.</td>
</tr>
<tr>
<td>Item Master (F4101)</td>
<td>Stores basic information about each item in inventory, such as item numbers, description, category codes, and units of measure.</td>
</tr>
<tr>
<td>Branch/ Plant (F4102)</td>
<td>Stores branch/plant information, such as quantities and branch level category codes.</td>
</tr>
</tbody>
</table>
Table Description

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Location (F41021)</td>
<td>Stores primary and secondary locations for an item.</td>
</tr>
<tr>
<td>Cost Ledger (F4102)</td>
<td>Stores cost information for an item</td>
</tr>
<tr>
<td>Base Price (F4106)</td>
<td>Stores base price information for an item</td>
</tr>
<tr>
<td>Sales Order Detail (F4211)</td>
<td>Defines which level of the configured item is related to a component and complete information for each line of the sales order</td>
</tr>
<tr>
<td>Sales Order Header (F4201)</td>
<td>Maintains the billing instruction, address, and delivery information for a customer order</td>
</tr>
</tbody>
</table>

Menu Overview

The JD Edwards World Configuration Management system uses the following menus.

**Menu Overview - Configuration Management**

**Configurator G32**

**Setup Processes**

* Configurator Setup G3241

**Daily Operations**

* Configurator G32

**Advanced and Technical Processes**

* Advanced Configurator G3231
Example Multi-Level Configured Item

A forklift is an example of a multi-level configured item. Its subassemblies include the boom and fork. For the item and each subassembly in the forklift, segments represent features and options.
To enter a sales order

You enter a sales order to record information about your customers and the items they order. When you enter a configured item, the system prompts you to answer option and feature questions to define the correct components, prices, and work orders. Revise the following steps as needed to clarify flow.

On Enter/Change Sales Order

1. Complete the following required fields and press Enter:
   - Sold To
   - Branch/Plant
   - Quantity
   - Item

On Configured Item Specifications
2. Do one of the following:
   - To accept the default values, press Enter.
   - To select another value, access Segment Value Selection and select a value.
3. Repeat step 2 for the remaining segments and lower level items.
4. To process the sales order, press Enter.
5. On Enter/Change Sales Order, locate your sales order to display the price, component item, and configured text information.
2 Setup
Overview to Configuration Management Setup

Objectives

- To identify a configured item
- To set up segments that identify the main features of a configured item
- To set up the relationships among features
- To establish which parts are included on the sales order
- To specify increases or decreases in the price of the configured item based on which options are chosen
- To specify how to manufacture the item by choosing the proper routing steps
- To review configuration information

About Configuration Management Setup

You must set up the Configuration Management system before you can enter sales orders for configured items.

Setting up Configuration Management consists of the following tasks:

- Setting up item information
- Setting up distribution information
- Setting up constants
- Setting up segments
- Setting up cross-segment editing rules
- Understanding derived calculations
- Setting up assembly inclusion rules
- Understanding tables
- Setting up tables
- Printing reports

You must first set up the following information:

- Configured item information
- Constants
Segments
Cross-segment editing rules
Assembly inclusion rules
Tables

You set up configured item information for other systems, including:

- Inventory Management
- Pricing Management
- Sales Order Management
- Product Data Management

Use Configuration Management constants to control processing for your business. You can use constants to control:

- Branch/plant-specific information about work order processing
- Sales quote processing
- Availability checking
- Whether calculated segments appear

Segments are the features and options of the configured item. Segments represent product characteristics such as color, material, or size. You assign numbers to each segment of the configured item. The numeric sequence determines the order in which you specify the segment value during sales order entry.

You set up cross-segment editing rules with logic statements to establish the relationship between the segments. Use these rules to prevent invalid configurations during sales order entry. You can define custom error messages for a cross-segment editing rule.

Assembly inclusion rules process requested features from sales order entry into the specific components and routing operations necessary to build the configured item. Different types of assembly inclusion rules allow you to define:

- Components
- Price/cost adjustments
- Routings
- Calculated values

You can also set up tables for assembly inclusion rules to reference information that is based on segment values. Table processing might also be referred to as matrix processing. You might define tables for components, prices, and calculated values. Using tables reduces the amount of rules that are required, simplifies rule maintenance, and improves processing time.
Set Up Item Information

Setting Up Item Information

You must set up item information for your configured item and its components and configured subassemblies. Use programs in the Inventory Management and Product Data Management systems to define item information.

Setting up item information consists of the following tasks:

- Entering Item Master Information
- Entering Branch/ Plant Information
- Entering a Routing

Entering Item Master Information

You enter Item Master information that is unique to the item across all branch/ plants. This includes stocking and pricing information.

You have several options for pricing a configured item. Choose from the following pricing methods:

- Total the list prices of components to determine the configured item price
- Use the list price of the configured item
- Use assembly inclusion pricing rules to determine the price
- Total the discounted price of components
To enter Item Master information

On Item Master Information

![Item Master Information](image)

Complete the following fields:
- Stocking Type
- Line Type
- Inventory Cost Level
- Kit Pricing Method
- Lot Process Type

**Note:** For the configured item, you must set the Stocking Type to C, the Line Type to W, and the Inventory Cost Level to 3.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd Item Number</td>
<td>The system provides three separate item numbers plus an extensive cross-reference capability to alternate item numbers. These item numbers are:</td>
</tr>
<tr>
<td></td>
<td>1. Item Number (short) - An 8-digit, computer-assigned item number.</td>
</tr>
<tr>
<td></td>
<td>2. 2nd Item Number - The 25-digit, free-form, user defined, alphanumeric item number.</td>
</tr>
<tr>
<td></td>
<td>3. 3rd Item Number - Another 25-digit, free-form, user defined, alphanumeric item number.</td>
</tr>
<tr>
<td></td>
<td>In addition to these three basic item numbers, an extensive cross-reference search capability has been provided (see XRT). Numerous cross-references to alternate part numbers can be user defined (for example, substitute item numbers, replacements, bar codes, customer numbers, or supplier numbers).</td>
</tr>
<tr>
<td>Stocking Type</td>
<td>A user defined code (41/I) that indicates how you stock an item, such as finished goods or raw materials. The following stocking types are hard-coded and you should not change them:</td>
</tr>
<tr>
<td></td>
<td>B Bulk floor stock</td>
</tr>
<tr>
<td></td>
<td>C Configured item</td>
</tr>
<tr>
<td></td>
<td>F Feature</td>
</tr>
<tr>
<td></td>
<td>K Kit parent item</td>
</tr>
<tr>
<td></td>
<td>N Non-stock</td>
</tr>
<tr>
<td>Line Type</td>
<td>A code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces (General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management). It also specifies the conditions under which a line prints on reports and is included in calculations. Codes include:</td>
</tr>
<tr>
<td></td>
<td>S Stock item</td>
</tr>
<tr>
<td></td>
<td>J Job cost</td>
</tr>
<tr>
<td></td>
<td>N Non-stock item</td>
</tr>
<tr>
<td></td>
<td>F Freight</td>
</tr>
<tr>
<td></td>
<td>T Text information</td>
</tr>
<tr>
<td></td>
<td>M Miscellaneous charges and credits</td>
</tr>
<tr>
<td></td>
<td>W Work order</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Inventory Cost Level</strong></td>
<td>A code that indicates whether the system maintains one overall inventory cost for the item, a different cost for each branch/plant, or a different cost for each location and lot within a branch/plant. The system maintains inventory costs in the Inventory Cost table (F4105). Valid codes are:</td>
</tr>
<tr>
<td>1</td>
<td>Item level</td>
</tr>
<tr>
<td>2</td>
<td>Item/Branch level</td>
</tr>
<tr>
<td>3</td>
<td>Item/Branch/Location level</td>
</tr>
<tr>
<td><strong>Kit Pricing Method</strong></td>
<td>A code that indicates how the system determines the sales price of a kit or configured item. Valid codes are:</td>
</tr>
<tr>
<td>1</td>
<td>The system totals list prices of components to determine the kit or product family price.</td>
</tr>
<tr>
<td>2</td>
<td>The list price of the final kit. This is the kit or product family price from the Base Price table (F4106).</td>
</tr>
<tr>
<td>3</td>
<td>The price inclusion rules for the product family determine the product family price (for configured items only).</td>
</tr>
<tr>
<td>4</td>
<td>The kit or product family price is the sum of the components' discounted prices. There is no discount on the parent.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reg. or Lot Processing</td>
<td>A code that indicates whether lot or serial number is assigned. Lot and serial number processes use the Lot Master table (F4108).</td>
</tr>
<tr>
<td></td>
<td>Valid codes are:</td>
</tr>
<tr>
<td>0</td>
<td>Lot assignment is optional. You can manually assign numbers. Quantity can be greater than one (default).</td>
</tr>
<tr>
<td>1</td>
<td>Lot assignment is required. The system assigns numbers using the system date in YYMMDD format. Quantity can be greater than one.</td>
</tr>
<tr>
<td>2</td>
<td>Lot assignment is required. The system assigns numbers in ascending order using Next Numbers. Quantity can be greater than one.</td>
</tr>
<tr>
<td>3</td>
<td>Lot assignment is required. You must manually assign numbers. Quantity can be greater than one.</td>
</tr>
<tr>
<td>4</td>
<td>Serial number assignment is optional except during shipment confirmation. Quantity must not exceed one.</td>
</tr>
<tr>
<td>5</td>
<td>Serial number assignment is required. The system assigns numbers using the system date in YYMMDD format. Quantity must not exceed one.</td>
</tr>
<tr>
<td>6</td>
<td>Serial number assignment is required. The system assigns numbers in ascending order using Next Numbers. Quantity must not exceed one.</td>
</tr>
<tr>
<td>7</td>
<td>Serial number assignment is required. You must manually assign numbers. Quantity must not exceed one.</td>
</tr>
</tbody>
</table>

Form-specific information

Use codes 4 through 7 for advanced serial number processing. In Purchase Management, you add serial numbers using the Lot field on Purchase Order Detail. Each item must have a unique serial number.

For items requiring serial numbers as well as lot assignments, use the Lot Process Type field in conjunction with the Serial No Required field. Codes 3 through 5 for the Serial No Required field indicate the setup requirements necessary for these items.

See Also

- Entering Basic Item Information (P4101) in the Inventory Management Guide
2B Set Up Item Information

Entering Branch/Plant Information

From Inventory Management (G41), choose Inventory Master/Transactions

From Inventory Master/Transactions (G4111), choose Item Branch/Plant Information

You enter branch/plant information that is unique to an item for a specific branch/plant. This includes lot and lead time information.

To enter branch/plant information

On Item Branch/Plant Information

1. Locate your configured item.
2. Complete the following fields:
   - Stocking Type
   - Serial Number Required
   - Lot Status Code
   - Lot Process Type
   
   For the configured end item, you must set the Stocking Type to C and the Line Type to W.
3. Access Plant Manufacturing Data (F10).
4. On Plant Manufacturing Data, complete the following fields:

- Leadtime Level
- Leadtime Manufacturing
- Leadtime Cumulative
- Leadtime Per Unit
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serial No. Required</td>
<td>A code that indicates whether you must attach a serial number to this item at the time of receipt or sale for basic serial number processing, or if memo lot information is required for advanced serial number processing. You can use basic serial number processing for informational purposes only. For example, you can add a serial number for an item, and review the number later. For basic serial number processing, valid values are: Y Yes, the system requires a serial number for all transactions pertaining to this item in related inventory, sales, and purchase order programs N No, the system does not require a serial number The system does not use this information if you use advanced serial number processing. Advanced serial number processing allows you to track an item through purchasing and sales based on a serial number. To specify serial number requirements, you must use the Lot Process Type field on Item Master Information. Values 3 through 5 indicate whether lot assignment is required for items with serial numbers. You can require assignment of up to three lot numbers, including Supplier Lot, Memo Lot 1, and Memo Lot 2. To specify lots for items with serial numbers, you must use the following values: 3 Supplier lot number required (purchasing only) 4 Supplier lot number required (purchasing only), and Memo Lot 1 required 5 Supplier lot number required (purchasing only), Memo Lot 1 required, and Memo Lot 2 required</td>
</tr>
<tr>
<td>Lot Status Code</td>
<td>A user defined code (table 41/L) that indicates the status of the lot. If you leave this field blank, it indicates that the lot is approved. All other codes indicate that the lot is on hold. You can assign a different status code to each location in which a lot resides on Item/ Location Information or Location Lot Status Change.</td>
</tr>
<tr>
<td>Level Lead time</td>
<td>A value that represents the lead time for an item at its assigned level in the production process, as defined on Plant Manufacturing Data. The system uses this value to calculate the start dates for work orders using fixed lead times. Level lead time is different for purchased and manufactured items: You can enter level lead time manually on Manufacturing Values Entry, or you can use the Lead time Rollup program calculate it. To calculate level lead time using the Lead time Rollup program, you must first enter a quantity in the Manufacturing Lead time Quantity field in the Item Branch table (F4102).</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Manufacturing Lead time | The total number of days required to build an item from its lowest level components to the final assembly. This value is the total of the level lead times for all manufactured items, plus the highest manufacturing lead time for all its components.  
If all components are purchased, the manufacturing lead time equals the item's level lead time. Purchased item lead times are not included in the calculation of manufacturing lead times.  
You can enter the manufacturing lead time manually or you can have the system calculate it when you run the Lead time Rollup program. |
| Cumulative Lead time   | The total number of days required to build an item from its lowest level components to the final assembly. The system calculates the value differently for manufactured and purchased items.  
Manufactured - The total of all level lead times for all manufactured items, plus the highest cumulative lead time of all its components.  
Purchased - The item's level lead time. Purchased item lead times are included in the calculation of cumulative lead times.  
You can enter this value manually or you can have the system calculate it when you run the Lead time Rollup program. |
| Lead time Per Unit     | The total number of hours required to build one unit as specified on the routing. This value is factored by the time basis code.  
You can enter this value manually, or you can have the system calculate it when you run the Lead time Rollup program. The system overwrites this value when you run the Lead time Rollup program.  
The system uses this field to calculate start dates for work orders when you use variable lead times. |

**Processing Options**

See [Branch/Plant Item Information (P41026)](#).
See [Manufacturing Data (P41027)](#).

**See Also**

- Entering Branch/Plant Information (P41026) in the Inventory Management Guide
Entering a Routing

You define all possible routings for the configured item and later use assembly inclusion rules to choose which routing to attach to the work order. The routing assembly inclusion rule allows you to define any complete routing or specific routing operation to attach to a configured item work order. However, you do not need to enter a routing for the configured item's part number.

To enter routings

On Enter/Change Routing

Complete the following fields:
- Item Number
- Branch/Plant
- Work Center
- Operation Sequence Number
### Field Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Branch/ Plant        | A code that represents a high-level business unit. It can be used to reference a branch or plant that might have departments or jobs, which represent lower-level business units (data item MCU), subordinate to it. For example:  
  - Branch/ Plant (MMCU)  
  - Dept A (MCU)  
  - Dept B (MCU)  
  - Job 123 (MCU)  
  Business unit security is based on the higher-level business unit. |
| Form-specific information | The branch/plant in which the routing is located. |
| Work Center          | A number that identifies a branch, plant, work center, or business unit.  
  Form-specific information | For Equipment users, this is the craft/resource responsible for completing the maintenance activity. |
| Oper Seq No          | In routings, this number is used to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.  
  In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Control system uses this field in the backflush/preflush by operation process.  
  In engineering change orders, this number is used to sequence the assembly steps for the engineering change.  
  The Skip To field allows you to enter an operation sequence that you want to begin the display of information.  
  You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13. |

### Processing Options

See [Routing Master Revisions (P3003)](#).

### See Also

- Entering a Routing (P3003) in the [Product Data Management Guide](#)
Set Up Configurator Smart Parts

About Smart Parts

In Configurator, smart parts are a way to reduce the number of P or Q-assembly inclusion rules needed to select parts for a configured item. Smart parts use logic similar to derived calculations, except alphanumeric strings are returned, and these strings signify a part number that already exists in the system.

Smart parts can be Short, 2nd item numbers, or 3rd item numbers, depending on the part numbering symbol conventions specified in the Branch Plant Constants.

Following is an example where a smart part is being used to add the paint to the parts list for configured item MGB. The paint color is selected in Segment 50. UDC table 55/PC has the different options for paint color, and each choice has a 3 character code.

![Image of UDC table]

Since there are 14 different choices of paint, you would have to enter 14 rules to get the paint added to the parts list using the normal Assembly Inclusion Rules. Only one rule is needed when you use smart parts.

When using smart parts, set up the part number in the Item Master (F4101) and Item Branch (F4102) beforehand, and make sure that you include a part number for all of the values related to the smart part.
In these steps, the part numbers have already been set up using a PT naming convention followed by the three character codes from UDC table 55/ PC. For example, the name for black paint combines ‘PT’ with the UDC table value ‘BLK’ to create ‘PT’BLK.’

**Note:** Type single quotes around the PT text, followed by the value from segment 50, to instruct the system to use this entry as a text string in the smart part calculation. For example, type ‘PT’S50. In this example, the entry ensures that item PTBLK will be added to the parts list when you order an MGB with black paint.

You can also define smart parts by:

- **Segment Number only** – Set up the part the same as the value of the segment. If the value of segment 20 is the smart part, enter S20 on the smart part line.

- **Concatenating Segments** – The values from more than one segment can be joined together to create a part number. You can join smart parts together, such as CONCAT(S20,S30) or simply S20,S30.

- **Substrings** – If only a portion of the value returned is the part number, you can use substring functionality. For example, if the value of segment 10 is 1234567 and the last four characters make up the Smart Part, write the rule as SUBSTR(S10,4,4). To select part number 4567, select the value from segment 10, starting at position 4, and include four positions.

- **Segments from other levels** – To return a value from a segment on a higher level, enter the segment from the higher level, followed by the item number and an equal sign proceeding and following it. For example, if the item MGB is a subassembly of configured item CAR, enter S10=CAR (the value of segment 10 from CAR for a smart part on MGB).
Setting Up Smart Parts

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Configured Item Segments

To add a smart part

On Configured Item Segments

1. Complete the following fields for each segment:
   - Branch/ Plant
   - Configured Item
   - Text String
   - Display Item
   - Segment
   - Description
   - Required
   - Numeric Y/ N

2. Complete the following optional fields:
   - User Codes
   - Default Value

3. Press Enter, then press F3 to exit the screen.
4. Select Assembly Inclusion from the Configurator Setup menu.
5. Re-inquire on the configured item you just set up.

6. Enter a 4 in the Option field for the Smart Part and press Enter. This will bring up the Advanced Rule Function window. On the Smart Part line in Advanced Rule Function, you define a formula which will return a part number.
Set Up Distribution Information

Setting Up Distribution Information

Before you can enter configured item sales orders, you must provide information that is specific to your business for the Sales Order Management system.

Setting up distribution information consists of the following tasks:

- Setting Up Line Types
- Setting Up Order Activity Rules
- Setting Up Price Information
- Setting Up Pricing Groups
- Setting Up Discounting Information

Setting Up Line Types

From Sales Order Management (G42), enter 29
From Sales Order Management Setup (G4241), choose Order Line Types

You set up line types to generate work orders (in addition to sales orders) for configured items during sales order entry. The W line type generates a work order.
To set up line types

On Order Line Types

Complete the following fields:
Generate Work Order
Inventory Interface

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>WO</td>
<td>A code indicating whether the system automatically generates an internal work order for this line. Valid codes are Y (yes) and N (no, which is the default).</td>
</tr>
</tbody>
</table>
Set Up Distribution Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory Interface (Y/ N)</td>
<td>A code that identifies the type of interface to the Inventory Management system. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>Y The dollar or unit value of any activity containing this line type will be reflected in inventory. The system also edits the item you enter to ensure that it is a valid item. Y is the default.</td>
</tr>
<tr>
<td></td>
<td>A The number entered will be recognized as a G/L account number. This code is used in purchasing only.</td>
</tr>
<tr>
<td></td>
<td>B The system edits when using format 4 in purchase order entry. The system retrieves price data from the inventory tables, but does not update to the quantity on the purchase order. This code is valid only when the G/L Interface field is Y (yes). Budget checking is fully functional with this interface type.</td>
</tr>
<tr>
<td></td>
<td>D The item in this line is an inventory item that will not affect availability or quantities.</td>
</tr>
<tr>
<td></td>
<td>N This item is not an inventory item.</td>
</tr>
</tbody>
</table>

See Also

- Setting Up Order Line Types (P40205) in the Sales Order Management Guide

Setting Up Order Activity Rules

From Sales Order Management (G42), enter **29**

From Sales Order Management Setup (G4241), choose **Order Activity Rules**

You can set up order activity rules before you enter sales orders for configured items to define the specific steps in the sales order processing cycle for your business. A typical sales order cycle includes sales order entry, packing, shipping, and invoicing. For a work order-generated line item and sales order document type, you can add steps to the cycle for creating the work order parts lists and completing work orders for configured items. Both of these manufacturing processes can optionally update associated sales order activity.
To set up order activity rules

On Order Activity Rules

Complete the following fields:

Order Type
Line Type
Status

<table>
<thead>
<tr>
<th>Next Status Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Type</td>
<td>A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. JD Edwards World has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.) The following document types are defined by JD Edwards World and should not be changed:</td>
</tr>
<tr>
<td>P</td>
<td>Accounts Payable documents</td>
</tr>
<tr>
<td>R</td>
<td>Accounts Receivable documents</td>
</tr>
<tr>
<td>T</td>
<td>Payroll documents</td>
</tr>
<tr>
<td>I</td>
<td>Inventory documents</td>
</tr>
<tr>
<td>O</td>
<td>Purchase Order Processing documents</td>
</tr>
<tr>
<td>J</td>
<td>General Accounting/ Joint Interest Billing documents</td>
</tr>
<tr>
<td>S</td>
<td>Sales Order Processing documents</td>
</tr>
</tbody>
</table>
4B Set Up Distribution Information

**Next Status Field**

<table>
<thead>
<tr>
<th>Line Type</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>Stock item</td>
</tr>
<tr>
<td>J</td>
<td>Job cost</td>
</tr>
<tr>
<td>N</td>
<td>Non-stock item</td>
</tr>
<tr>
<td>F</td>
<td>Freight</td>
</tr>
<tr>
<td>T</td>
<td>Text information</td>
</tr>
<tr>
<td>M</td>
<td>Miscellaneous charges and credits</td>
</tr>
<tr>
<td>W</td>
<td>Work order</td>
</tr>
</tbody>
</table>

**Form-specific information**

- **Header field:** Use this field to help define an inquiry. You can enter a specific code or you can enter an asterisk (*) to indicate all line types.
- **Detail field:** The code identifying the line type of the order activity rule.

**Stat**

- A user defined code (system 40/ type AT) that indicates the status of the line.

**Stat**

- A user defined code (40/AT) that indicates the next step in the order process.

### See Also

- Setting Up Order Activity Rules (P 40204) in the Sales Order Management Guide

### Setting Up Price Information

After you have defined the pricing method on Item Master Information, you must define base prices for the components and the configured item. The system uses the base price to price the item. If you define special pricing or discounts for the item, the system bases the calculation of the discounted price on the base price.

For price method codes 1, 2, and 3, you can apply discounts to the configured item. For price method code 4, you can apply discounts to the configured item’s components. You can define price adjustment assembly inclusion rules for all price method codes.
The price method code determines whether to price components or parent items. Use base pricing to define prices for:

- An item or group of items
- A specific time period
- Different units of measure
- Different currencies

You can also use advanced pricing schedules for configured items in association with the price method code. However, advanced pricing does not support placing a new line item on the sales order, such as free items.

To set up base price information

On Base Price Revisions

Complete the following fields:

- Item Number
- Branch/Plant
- Currency Code
- UM
- Unit Price
- Effective From
- Effective Thru
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cur Cod</td>
<td>A code that indicates the currency of a customer’s or a supplier’s transactions.</td>
</tr>
<tr>
<td>UM</td>
<td>A user defined code (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).</td>
</tr>
<tr>
<td>Unit Price</td>
<td>The list or base price to be charged for one unit of this item. In sales order entry, all prices must be set up in the Base Price table (F4106).</td>
</tr>
<tr>
<td>From</td>
<td>The date on which a transaction, text message, contract, obligation, or preference becomes effective.</td>
</tr>
<tr>
<td>Thru</td>
<td>The date on which a transaction, text message, agreement, obligation, or preference has expired or been completed.</td>
</tr>
</tbody>
</table>

### See Also

- Defining Base Prices (P4106) in the Sales Order Management Guide
- Price and Adjustment Schedule (P4070) in the Advanced Pricing Guide
- Entering Basic Item Information (P4101) in the Inventory Management Guide

### Setting Up Pricing Groups

Use pricing groups to group items or customers with similar characteristics. This streamlines the processes of entering and maintaining base prices.

Setting up pricing groups consists of the following tasks:

- Set up item price groups
- Set up customer price groups
To set up item price groups

From Sales Order Management (G42), choose **Price Management**
From Price Management (G4222), choose **Define Item Price Groups**

On Define Item Price Groups

![Image of Define Item Price Groups window]

Complete the following required field:

**Price Group**

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Price Group</td>
<td>A user defined code (40/PI) that identifies an inventory price group for an item. Inventory price groups have unique pricing structures that direct the system to incorporate discounts or markups on items on sales and purchase orders. The discounts or markups are based on the quantity, dollar amount, or weight of the item ordered. After you assign a price group to an item, the item uses the same pricing structure that was defined for the inventory price group. You must assign an inventory price group to the supplier or customer, as well as to the item, for the system to interactively calculate discounts and markups on sales orders and purchase orders.</td>
</tr>
</tbody>
</table>
To set up customer price groups

From Sales Order Management (G42), choose Price Management
From Price Management (G4222), choose Define Customer Price Groups

On Define Customer Price Groups

![](image)

Complete the following required field:

Price Group

Processing Options

See Customer/Item/Order Detail Group (P4092).

See Also

- Setting Up Customer Price Groups (P4092) in the Sales Order Management Guide

Setting Up Discounting Information

From Sales Order Management (G42), choose Price Management
From Price Management (G4222), choose Inventory Pricing Rules

After you set up base prices or rules based pricing, you can define how to apply discounts or markups for different circumstances.
To set up discounting information

On Inventory Pricing Rules

Complete the following fields:

Pricing Rule
Pricing Method
Level
Up To Quantity
Basis
Factor Value
Factor Value Type (%/ $)
Override Price
Effect Date
Expire Date
Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pricing Method</td>
<td>A user defined code (system 42, type CT) that indicates the basis for the price rule. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>P</td>
</tr>
<tr>
<td></td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>R</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Pricing Rule</td>
<td>User defined code (table 40/ PI) used to classify inventory by pricing rules. Typically, these categories correspond to the major sections in the inventory price book. You can set up as many detail categories as you need. A single code can be used for sales, purchasing, order/ basket, and contract pricing. If you set up a contract rule, it must equal the short number for the item under contract.</td>
</tr>
<tr>
<td>Lvl</td>
<td>An alphanumeric code that determines the sequence in which the system displays the rules within the pricing group. You define levels when you set up the pricing groups.</td>
</tr>
<tr>
<td>Up To Quantity</td>
<td>The volume or quantity breaks commonly used in pricing tables. If the quantity shown on the first level of a rule is 5, then the pricing logic shown on this level applies only to sales of five or fewer items. If the quantity shown in the next level is 10, then the pricing logic applies to sales of 6 through 10 items. 99,999,999 indicates all quantities.</td>
</tr>
<tr>
<td>Basis</td>
<td>A costing method on which the system bases the order’s net price. The following codes are valid for pricing and repricing: 1 Last-In Cost 5 Future Cost 2 Average Cost 6 Lot Cost 3 Memo Cost 1 7 Standard Cost 4 Current Cost The system uses the method you enter here to determine the order’s net price. In sales order repricing, the system bases all reprice calculations on either the unit cost or price in the sales detail. Specify P if you want the system to use unit price in the sales order as the basis for reprice calculations. Otherwise, specify a value between 1 to 8 to use the unit cost in the sales detail as the base on value for all reprice calculations.</td>
</tr>
<tr>
<td>Factor Value</td>
<td>The discount that the system uses when it calculates the price of an item attached to this inventory pricing rule. Discounts can be expressed as multipliers, additional amounts, or deductible amounts. For example, a 10% discount would be expressed as .90. You can use the same factor for markups over cost. For example, a 10% markup would be expressed as 1.10.</td>
</tr>
</tbody>
</table>
### Field Explanation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Factor Value - Type</td>
<td>A code that indicates whether the factor value is a multiplier (%) or an additional/deductible cash amount (&amp;) when applied to an order’s price.</td>
</tr>
<tr>
<td>Override</td>
<td>Any price you enter here overrides all other rules or prices.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The date on which a level within a pricing method takes effect. There can be multiple records within a pricing method that have the same level identifier, discount percentage, and so forth, with the only difference being the effective date. This may occur due to special promotion periods.</td>
</tr>
<tr>
<td>Expire Date</td>
<td>The date a particular pricing level within a pricing method expires. Within a pricing method, there might be multiple records that have the same level identifier, discount percentage, and so forth, but have different expiration dates. This might occur due to special promotion periods.</td>
</tr>
<tr>
<td>Desc</td>
<td>The descriptive name used to identify a particular discount.</td>
</tr>
</tbody>
</table>

**See Also**

- Defining Price Adjustments (P4271) in the Sales Order Management Guide
Setting Up Constants

Use constants to control Configuration Management processing for your branch/plants. For each branch/plant, you can:

- Control whether parts lists and routings are attached to work orders with batch or subsystem processing
- Define the configured string delimiter
- Whether the calculated segments appear during sales order entry
- Perform parent availability checking during sales order entry
- Cost sales quotes with manufacturing labor and overhead
- Define which stocked line type to use if the system finds a matching configuration in stock during sales order entry
- Indicate sales quote document types
- Define the status code beyond which changes to the sales order will result only in a status change to the associated work order

The system stores constants in the Configured Constants table (F3209).
To set up constants

On Configurator Constants

1. Locate the branch/plant.
2. Complete the following fields:
   - Parts List/Routing
   - Segment Delimiter
   - Check Availability
   - In Stock Line Type
   - Quote Document Type List
   - Cost Sales Quotes
   - Work Order Status for Changes
   - Display Calculated Segments

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment Delimiter</td>
<td>A character separator for configured item sales order entry. The default character is a forward slash (/). This character must be the same for each branch/plant. Also:</td>
</tr>
<tr>
<td></td>
<td>- Although you can define a different character, do not use an asterisk (*).</td>
</tr>
<tr>
<td></td>
<td>- Do not change this value after you have established it.</td>
</tr>
<tr>
<td></td>
<td>- The segment delimiter should not be part of an answer to a segment question.</td>
</tr>
</tbody>
</table>
### Field | Explanation
--- | ---
Parts List/ Routing | Controls whether the parts list and routing for configured item work orders will be created using subsystem or batch processing. Both methods use the Order Processing DREAM Writer (P31410) to write parts list and routing records.

Valid values are:

1. Batch processing. You must run the Order Processing program and change the selection options to accommodate the different sales order numbers being processed. You can also select orders based on their work order status.
2. Subsystem processing. After you start the subsystem, the Order Processing program automatically processes any new work orders generated from a configured item sales order. Subsystem processing involves less user interaction and does not generate shop floor paperwork.

Check Availability (Y/ N) | Indicates whether to verify that a configured parent item is in stock during sales order entry. The default value is Y.

The system searches inventory for a configuration that matches the parent item during sales order update. If more than one of the item is located, a window displays all matching locations, lots, and their available quantities. From the window, you can select an item to hard commit during the update. If one item is located, the item is hard committed to inventory during the update.

In Stock Line Type | A code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces (General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management). It also specifies the conditions under which a line prints on reports and is included in calculations. Codes include:

- S Stock item
- J Job cost
- N Non-stock item
- F Freight
- T Text information
- M Miscellaneous charges and credits
- W Work order

Quote Document Type List | The Sales Quote Document Type List is a user defined code table (32/QL) that is used to define valid document types for sales quotes in your company. For example, you could define sales quote document types by branch/plant or by type of quote, such as corporate or seasonal quotes.
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Sales Quotes (Y / N)</td>
<td>Indicates which costs are accumulated when the Order Type matches one of the Sales Quote Document Types.</td>
</tr>
<tr>
<td>Y</td>
<td>All costs from all rules are accumulated. This is the default value.</td>
</tr>
<tr>
<td>N</td>
<td>Only the costs of the P rules are accumulated.</td>
</tr>
<tr>
<td>WO Status for Changes</td>
<td>This field determines the value of the work order status field (user defined code 00/8) for a configured item. Sales Order Entry has processing options that determine the beginning status and the change status of a work order for a configured item. The processing options work as follows:</td>
</tr>
<tr>
<td></td>
<td>• If the current status of the work order is greater than or equal to the work order change status, the system enters the code value from the change status processing option into the status field on the work order.</td>
</tr>
<tr>
<td></td>
<td>• If the current status of the work order is less than the work order change status, the system enters the code value from the beginning status processing option into the status field on the work order.</td>
</tr>
<tr>
<td>Display Calculated Segments</td>
<td>Indicates whether calculated segments will display during sales order entry. If this value is N, segments will not display when entering a sales order, however, the value of the segment will be stored in history. If entering a multi-level configured item, levels that have only calculated segments will not display. The default value is N.</td>
</tr>
</tbody>
</table>
Set Up Segments

Setting Up Segments

A segment is a feature of a configured item, such as color, size, fabric, or power type. You assign segments for the configured item in a numeric sequence. This sequence determines the order in which you provide information about each configured item during sales order entry.

For example, FORKLIFT-A contains the following segments:

- 10 Lift Rating
- 20 Power Type
- 30 Boom Height
- 40 Paint
- 50 Propane Tank
- 60 Calculated Counterweight

During sales order entry you can enter a value for each segment. This value can be restricted by:

- Numeric or alphabetic checking
- Range checking
- User defined code table containing all valid answers

You use segments to define cross-segment editing rules that ensure valid configurations. During sales order entry, the system checks the combination of features and options to ensure that the item can be manufactured.

You use segments to define assembly inclusion rules that determine configuration-specific prices, components, calculated values, and routing steps.

You can define three types of segments:

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td>During sales order entry, you must provide this required information. For required segments, you can define a table of values, a range of values, or alphanumeric conditions to perform edit checking during sales order entry.</td>
</tr>
<tr>
<td>Optional</td>
<td>During sales order entry, this information is optional. For optional segments, you can define a table of values, a range of values, or alphanumeric conditions to perform edit checking during sales order entry.</td>
</tr>
</tbody>
</table>
Set Up Segments

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculated</td>
<td>During sales order entry, the system calculates the value for this segment. You define the calculation with assembly inclusion rules.</td>
</tr>
</tbody>
</table>

Note: The segment information for a configured item should be the same across branch/plants to allow transfers to other branches.

Setting up segments is the starting point for Configuration Management. You must know information about each segment to determine the configured item’s price and to manufacture the item.

Setting up segments consists of the following tasks:

- **Defining a Segment**
- **Setting Up User Defined Codes**
- **Locating Segment Information**
- **Comparing Segment Values**

Before You Begin

- Verify that the stocking type for a configured item is C (configured). For more information, see Entering Basic Item Information (P4101) in the Inventory Management Guide.
- Create routings for the configured item and for the components that are manufactured. For more information, see Entering a Routing (P3003) in the Product Data Management Guide.
- Set the pricing method on Item Master Information. For more information, see Entering Basic Item Information (P4101) in the Inventory Management Guide.

Defining a Segment

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Configured Item Segments

To begin using the Configuration Management system, you must define the segments of each configured item. Both cross-segment editing rules and assembly inclusion rules use segments within logic statements.
To define a segment

On Configured Item Segments

1. Complete the following fields:
   - Branch/Plant
   - Configured Item
   - Text String
   - Display Item
   - Segment
   - Description
   - Required
   - Numeric Y/N

2. Complete the following optional fields:
   - User Codes
   - Default Value

3. Access More Details.
4. Complete the following optional fields:
   - Lower Value
   - Upper Value
   - Number of Spaces Before
   - Number of Spaces After
   - Print Segment Number
   - Print Segment Description
   - Print Value
   - Print Value Description
   - Save Segment
   - Return to New Line
   - Derived Calculation Rounding
   - Update Category Code

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Num</td>
<td>Valid values are:</td>
</tr>
<tr>
<td>Y</td>
<td>Indicates that the answer is numeric and therefore, should be right-justified.</td>
</tr>
<tr>
<td>N</td>
<td>Indicates that the answer is alphanumeric and, therefore, should be left-justified.</td>
</tr>
</tbody>
</table>
### Field Explanation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required or Optional</td>
<td>Indicates whether a segment is required or optional in a configuration, or whether it must be calculated to specification when entering a sales order. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>R Segment answer is required during sales order entry.</td>
</tr>
<tr>
<td></td>
<td>O Segment answer is optional during sales order entry.</td>
</tr>
<tr>
<td></td>
<td>C Segment is calculated during sales order entry. You define the calculation with assembly inclusion rules.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of an item, a remark, or an explanation. Form-specific information</td>
</tr>
<tr>
<td></td>
<td>On this screen, the description is of one of the segments for that product family. You can enter a description of the segment, or you can leave the field blank and the system will insert the default description from the user defined codes.</td>
</tr>
<tr>
<td>Lower Value</td>
<td>The lower allowed value of this specific segment. If you enter a value here, then you must also enter an upper allowed value.</td>
</tr>
<tr>
<td>Upper Value</td>
<td>The upper allowed value of this specific segment. If you enter a value here, then you must also enter a lower allowed value.</td>
</tr>
<tr>
<td>No. of Spaces Before</td>
<td>The number of spaces that should print before the segment information in the user defined format.</td>
</tr>
<tr>
<td>After</td>
<td>The number of spaces that should print after the segment information in the user defined format.</td>
</tr>
<tr>
<td>Print Segment Number</td>
<td>This field determines if the segment number should print on the sales order (Pick Slip and Invoice Print) and work order (Print Parts List). Valid values are:</td>
</tr>
<tr>
<td></td>
<td>Y or 1 - Print on both sales and work order</td>
</tr>
<tr>
<td></td>
<td>N or 0 - Do not print on sales and work order</td>
</tr>
<tr>
<td>Print Segment Description</td>
<td>This field determines if the segment description should print on the sales order (Pick Slip and Invoice Print) and work order (Print Parts List). Valid values are:</td>
</tr>
<tr>
<td></td>
<td>Y or 1 - Print on both sales and work order</td>
</tr>
<tr>
<td></td>
<td>N or 0 - Do not print on sales and work order</td>
</tr>
</tbody>
</table>
### Field Explanation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Value</td>
<td>This field determines if the segment value should print on the sales order (Pick Slip and Invoice Print) and work order (Print Parts List).</td>
</tr>
<tr>
<td></td>
<td>Valid values are:</td>
</tr>
<tr>
<td></td>
<td>Y or 1 - Print on both sales and work order</td>
</tr>
<tr>
<td></td>
<td>N or 0 - Do not print on sales and work order</td>
</tr>
<tr>
<td>Return to New Line</td>
<td>This field will control whether or not a new line should be started after the segment information is printed. The</td>
</tr>
<tr>
<td></td>
<td>Configurator Segment Delimiter from the Branch/Plant Constants will print if a new line is not started.</td>
</tr>
<tr>
<td></td>
<td>Y or 1 - Start new line after segment information</td>
</tr>
<tr>
<td></td>
<td>N or 0 - Continue printing on same line</td>
</tr>
<tr>
<td>Configurator Print Segmt</td>
<td>This field determines if the segment value description from an associated UDC table should print on the sales (Pick Slip and Invoice Print) and work order (Print Parts List).</td>
</tr>
<tr>
<td>Value Descript</td>
<td>Valid values are:</td>
</tr>
<tr>
<td></td>
<td>Y or 1 - Print on both sales and work order.</td>
</tr>
<tr>
<td></td>
<td>N or 0 - Do not print on sales and work order.</td>
</tr>
<tr>
<td>Derived Calc Rnd</td>
<td>This field will be used to indicate how many positions to the right of the decimal a derived calculation should be rounded.</td>
</tr>
<tr>
<td></td>
<td>For example,</td>
</tr>
<tr>
<td></td>
<td>▪ If the result of a derived calculation is 2190.123456789, enter 0 to round to the whole number 2190.</td>
</tr>
<tr>
<td></td>
<td>▪ Enter 4 to round up to 2190.1235.</td>
</tr>
<tr>
<td></td>
<td>▪ Leave the Derived Calculation Round field blank to avoid rounding.</td>
</tr>
<tr>
<td></td>
<td>The system rounds up by one any digit followed by 5 through 9. The system does not round any digit followed by 0 through 4.</td>
</tr>
</tbody>
</table>

### What You Should Know About

**Multi-level items**

You can define multi-level configured items with up to 10 levels. You use assembly inclusion rules to define item levels, and associated work orders.
### Setting up generic branch/plants
You can define segments, rules, and configured items that are specific to a branch/plant or generic across all branch/plants. A blank Branch/Plant field identifies a generic branch/plant.

- If you define generic branch/plants segments, you must also define generic cross-segment editing and assembly inclusion rules.
- If you don’t use the generic branch/plants, then segment information should be the same across branch/plants.

### Sequence
You must enter configured item segments in the sequence that you want to prompt the user for information during sales order entry.

### Configured item text
You can choose the format for displaying configured item text. You can display the configured string or use the detail area to create custom text that prints on sales orders, work orders, pick lists, and invoices.

### Calculated segments
If you define a segment as calculated, you do not need to enter user defined codes or define range checking. Use assembly inclusion rules to define the calculation for that segment. Calculated segments can be numeric or alpha numeric.

### Deleting segments
You cannot delete a configured item segment if cross-segment editing or assembly inclusion rules exist for that configured item.

### Adding new segments
When you add new segments to an existing configured item, enter them at the end of the list of existing segments.

### Updating category codes
You can specify which work order category code will be populated with the segment value during sales order entry.

#### See Also
- Setting up Assembly Inclusion Rules (P 3293)

### Setting Up User Defined Codes

**From Configurator (G32), enter 29**

**From Configurator Setup (G3241), choose Configured Item Segments**

From the Configurator Setup menu (G3241), choose Configured Item Segments.

You can create a user defined code table of segment values for a non-calculated segment. This task is optional. During sales order entry, if you have associated a required segment with a user defined code table, you must select a value from the table. If you have associated an optional segment with a user defined code table, you can enter either no value, or a value from the user defined code table.
To set up user defined codes

On Configured Item Segments


3. On User Defined Code Types, complete the following fields:
   - System Code
   - User Code
   - Description
   - Code Length
   - 2nd Line
   - Code Numeric

You can use codes 55 through 59 for Configuration Management user defined code types.


5. On User Defined Code Revisions, complete the following fields:
   - Code
   - Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Code</td>
<td>Identifies the table that contains user defined codes. The table is also referred to as a code type.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>Identifies the table that contains values.</td>
</tr>
<tr>
<td>Description</td>
<td>This window will allow you to enter specific values for the segments making up a configured item. Segment values are separated by a special character, called the segment delimiter.</td>
</tr>
<tr>
<td>Code Length</td>
<td>The length of the user defined code. It cannot be greater than 10 characters.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>The length of the user defined code. It cannot be greater than 10 characters. Do not change the code length without a program change.</td>
</tr>
<tr>
<td>2nd Line (Y/ N)</td>
<td>A response of Y or M will allow the entry of two lines of User Defined Codes in the revisions screen. A Y will also enable the User Defined Codes window to display a second line of description.</td>
</tr>
<tr>
<td></td>
<td>M is for maintenance only for second line display. This capability is seldom used, but has applicability in areas such as inventory product codes. The M value will not display the second line of description in the User Defined Codes window.</td>
</tr>
</tbody>
</table>
Locating Segment Information

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Segment Where Used

For the user defined code table that you specify, you can locate all configured items and segments that reference the table. This is useful for reviewing the effect of table changes on configured items.

To locate segments

On Segment UDC Where Used

Complete the following fields:
Branch/Plant
System Code
User Defined Code

See Also

- Printing Reports
Comparing Segment Values

Sometimes you may need to compare the numeric value of two segments to determine which value to return. This can be accomplished by creating calculated inclusion rules with derived calculations that determine which segment will be selected.

To compare two segments, you set up two calculated segments. The first provides the calculations necessary for the comparison. The second segment is the value returned from those calculations. Segment calculations are set up as conditional rules in Assembly Inclusion rules. The actual calculation you use depends upon the values you want to compare and the type of comparison you want to make.

Set up the calculated segments as described in section Defining a Segment.

Set up the calculations as described in the chapter Set Up Assembly Inclusion Rules.

To compare segment values

On Configured Item Segments

1. Set up item PM-CONFIG to contain numeric values for segments S30 and S40.
2. Access User Defined Code Revisions to set up the following possible values for segment 30:
   - 100
   - 200
   - 300

3. Set up segment 40 to return the following three possible values:
   - 150
   - 250
   - 350
After you have selected the desired values for both segments, you will want to select the greater of the two segments. To do this, write three Calculated (‘C’) Rules in the Assembly Inclusion screen (G3293).

4. On the Configured Item Segments screen (G3291), create a calculated segment to compare segments 30 and 40.

5. On Assembly Inclusion, create a calculation to designate Segment 50 as Segment 30 – Segment 40 (S30 – S40) in the Derived Calculation field.
The next step is to determine which segment (S30 or S40) that Segment 60 will return.

6. Create a calculation to determine that if Segment 50 is greater than zero, then Segment 60 is equal to Segment 30.

7. Create a calculation to determine that if Segment 50 is less than zero, then Segment 60 is equal to Segment 40.
Processing Options

See Assembly Inclusion Rules (P3293).

See Also

- Set Up Assembly Inclusion Rules
- Understand Derived Calculations (P3293)
Set Up Cross-Segment Editing Rules

Setting Up Cross-Segment Editing Rules

To ensure feature and option compatibility during sales order entry, use cross-segment editing rules to establish the relationships between the configured item segments with logic statements. This enables you to avoid invalid combinations of segments and prevent invalid sales orders. Error messages about invalid configurations appear based on segment information from the sales order and cross-segment editing rules.

Logic Statements

For each cross-segment editing rule, you can define an “if/then/else” logic statement for many conditions. For example, a forklift might require a different value for segment 30 (boom height), depending on the value of segment 10 (lift rating). The following cross-segment editing rule illustrates:

If segment 10 (lift rating) = 6000 pounds, then segment 30 (boom height) must = 12 (feet) else segment 30 must be <= 10 (feet).

Error Messages

As you enter a sales order, error messages appear for invalid combinations defined by cross-segment editing rules. You can define custom messages or the system can generate an error message. You have two options for controlling how error messages appear:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom messages</td>
<td>Create error messages for your rules that contain specific or custom information instead of the system-generated message. If a custom message exists for a rule, the system highlights the option column. For example: A 6000 LB capacity Forklift requires a gas or propane engine.</td>
</tr>
<tr>
<td>System messages</td>
<td>A system-generated message contains the cross-segment editing rule that has been violated. For example: IF Power Type (Seg. 020) is not equal to PROPANE THEN Propane Tank (Seg. 050) Should Be equal to *BLANK. Power Type (Seg. 020) is WARP. Propane Tank (Seg. 050) is 50LBTK.</td>
</tr>
</tbody>
</table>
Hard or soft error messages might appear:

<table>
<thead>
<tr>
<th>Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soft error message</td>
<td>For an invalid combination with an optional condition, a soft error message appears. You can either correct the segment value or override the error message, and continue configuring the item.</td>
</tr>
<tr>
<td>Hard error message</td>
<td>For an invalid combination with a required condition, a hard error message appears. To proceed, you must correct the problem by changing segment answers.</td>
</tr>
</tbody>
</table>

Setting up cross-segment editing rules consists of the following tasks:

- Setting Up Cross-Segment Logic
- Setting Up Custom Error Messages
- Reviewing Cross-Segment Editing Information

Setting Up Cross-Segment Logic

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Cross Segment Editing

Setting up cross-segment logic consists of the following tasks:

- Setting up logic statements
- Setting up values
- Setting up ranges
- Copying a rule
To set up logic statements

On Cross Segment Editing

1. Complete the following fields:
   - Branch/Plant
   - Configured Item
   - And/Or
   - Bracket Selection Beginning
   - Segment
   - Relationship
   - Value
   - Bracket Selection Ending
   - Segment
   - Required/Optional
   - Relationship
   - Value
   - Custom Text

2. Access the detail area.
3. Complete the following optional fields:

- Segment Item
- Segment Branch

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branch/ Plant</td>
<td>A number that identifies a branch, plant, work center, or business unit. Form-specific information: You can define a generic or blank branch/plant for cross segment editing rules and then use the rules for all branch/plants.</td>
</tr>
<tr>
<td>Configured Item</td>
<td>A number that the system assigns to an item. It can be in short, long, or 3rd item number format. Form-specific information: Header: The configured item number for which cross segment editing rules are being defined. Detail: The configured item number of the segment in the cross segment editing rules. This is used to reference a previously selected segment.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>And/Or Selection</td>
<td>A code that determines whether compound data selection logic is based on an A = AND condition or an O = OR condition.</td>
</tr>
<tr>
<td></td>
<td><strong>Form-specific information</strong></td>
</tr>
<tr>
<td></td>
<td>For configuration management, additional values include:</td>
</tr>
<tr>
<td></td>
<td>I If</td>
</tr>
<tr>
<td></td>
<td>E Else</td>
</tr>
<tr>
<td></td>
<td>* Then</td>
</tr>
<tr>
<td>Relationship</td>
<td>The relationship between the range of variances you display. Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>EQ Equal to</td>
</tr>
<tr>
<td></td>
<td>LT Less than</td>
</tr>
<tr>
<td></td>
<td>LE Less than or equal to</td>
</tr>
<tr>
<td></td>
<td>GT Greater than</td>
</tr>
<tr>
<td></td>
<td>GE Greater than or equal to</td>
</tr>
<tr>
<td></td>
<td>NE Not equal to</td>
</tr>
<tr>
<td></td>
<td>NL Not less than</td>
</tr>
<tr>
<td></td>
<td>NG Not greater than</td>
</tr>
<tr>
<td>Relationship</td>
<td>A code that identifies the operands in Boolean logic. You can specify any of the following:</td>
</tr>
<tr>
<td></td>
<td>EQ Equal to</td>
</tr>
<tr>
<td></td>
<td>LT Less than</td>
</tr>
<tr>
<td></td>
<td>LE Less than or equal to</td>
</tr>
<tr>
<td></td>
<td>GT Greater than</td>
</tr>
<tr>
<td></td>
<td>GE Greater than or equal to</td>
</tr>
<tr>
<td></td>
<td>NE Not equal to</td>
</tr>
<tr>
<td></td>
<td>NL Not less than</td>
</tr>
<tr>
<td></td>
<td>NG Not greater than</td>
</tr>
<tr>
<td>Txt Message</td>
<td>Indicates whether to display the custom message. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>Y Custom message will be displayed</td>
</tr>
<tr>
<td></td>
<td>N Custom message will not be displayed</td>
</tr>
<tr>
<td></td>
<td>If this value is Y with a segment and condition, it will only appear when that condition is false instead of the standard cross segment error message appearing.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Seg Item</td>
<td>A number that the system assigns to an item. It can be in short, long, or 3rd item number format. Form-specific information Header: The configured item number for which cross segment editing rules are being defined. Detail: The configured item number of the segment in the cross segment editing rules. This is used to reference a previously selected segment.</td>
</tr>
<tr>
<td>Seg Branch</td>
<td>This branch represents the branch of the segment’s configured item number. Use this value to reference a previously selected segment from a different configuration level.</td>
</tr>
<tr>
<td>Bracket Selection</td>
<td>A collection of open and closed brackets to group conditional configurator rules. For example, to define the condition (Seg 1 = A OR Seg 2 = B) AND Seg 3 = C, use the following brackets: (Seg 1 = A OR Seg 2 = B) AND Seg 3 = C</td>
</tr>
<tr>
<td>Beginning</td>
<td>Note: When you specify *VALUES in different versions of the original screen, you are prompted for multiple values lists.</td>
</tr>
<tr>
<td>Configurator If Selection</td>
<td>Indicates an “if” logic relationship for configuration rules. You can enter a specific UDC value or one of the following values:</td>
</tr>
<tr>
<td>Value</td>
<td>*VALUES Enter up to 45 values on a separate window. Note: When you specify *VALUES in different versions of the original screen, you are prompted for multiple values lists.</td>
</tr>
<tr>
<td></td>
<td>*BLANKS Search on a blank value.</td>
</tr>
<tr>
<td></td>
<td>*ZEROS Search for amounts equal to zero.</td>
</tr>
<tr>
<td></td>
<td>*RANGE Enter a range of values (example: 1 to 50). Note: The first value MUST be LESS than the second value.</td>
</tr>
<tr>
<td></td>
<td>*ALL Select all values. Note: If you leave this field blank, the default value is *ALL.</td>
</tr>
<tr>
<td>Bracket Selection Ending</td>
<td>A collection of open and closed brackets to group conditional configurator rules. For example, to define the condition (Seg 1 = A OR Seg 2 = B) AND Seg 3 = C, use the following brackets: (Seg 1 = A OR Seg 2 = B) AND Seg 3 = C</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Required or Optional</td>
<td>Indicates whether a segment is required or optional in a configuration, or whether it must be calculated to specification when entering a sales order.</td>
</tr>
<tr>
<td></td>
<td>Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>R   Segment answer is required during sales order entry.</td>
</tr>
<tr>
<td></td>
<td>O   Segment answer is optional during sales order entry.</td>
</tr>
<tr>
<td></td>
<td>C   Segment is calculated during sales order entry. You define the calculation with assembly inclusion rules.</td>
</tr>
<tr>
<td>Form-specific information</td>
<td>For cross segment editing rules, this value determines whether the invalid configuration error message is hard or soft.</td>
</tr>
<tr>
<td></td>
<td>Valid codes are:</td>
</tr>
<tr>
<td></td>
<td>R   Hard error message</td>
</tr>
<tr>
<td></td>
<td>O   Soft error message</td>
</tr>
<tr>
<td>Configurator Then Selection Value</td>
<td>Indicates a &quot;then&quot; logic relationship for configuration rules. You can enter a specific UDC value or one of the following values:</td>
</tr>
<tr>
<td></td>
<td>*VALUES Enter up to 45 values on a separate window.</td>
</tr>
<tr>
<td></td>
<td>Note: When you specify *VALUES in different versions of the original screen, you are prompted for multiple values lists.</td>
</tr>
<tr>
<td></td>
<td>*BLANKS Search on a blank value.</td>
</tr>
<tr>
<td></td>
<td>*ZEROS Search for amounts equal to zero.</td>
</tr>
<tr>
<td></td>
<td>*RANGE Enter a range of values (example: 1 to 50).</td>
</tr>
<tr>
<td></td>
<td>Note: The first value MUST be LESS than the second value.</td>
</tr>
<tr>
<td></td>
<td>*ALL Select all values.</td>
</tr>
<tr>
<td></td>
<td>Note: If you leave this field blank, the default value is *ALL.</td>
</tr>
</tbody>
</table>

To set up values

On Cross Segment Editing

1. Complete the following field with *VALUE:
Value

The system prompts you for the valid values for the rule you are entering.

### Field Explanation

| Selection value | The data selection value. A special facility has been provided to allow selection of multiple specific values. By entering "VALUES" in the selection field, a special display screen will be displayed allowing the entry of up to 45 specific values. If you specify "VALUES" in multiple selections of the original display, you will be prompted for multiple values lists. Enter the value "BLANKS" if you are searching on a blank value. You cannot leave the values field blank to search on blanks, it will default to "ALL". Enter the value "ZEROS" when searching for amounts equal to zero.

The "RANGE" keyword will display a special display screen which will allow the entry of a range of values (i.e., from 1 to 50). The first value MUST be LESS than the second value. If it is equal or greater than, it will not work.

If you want to select all values for a field, enter "ALL".

---

**What You Should Know About**

**Revising VALUE**

To revise existing "VALUE entries, place the cursor on "VALUE and choose the Range and Values function.**
To set up ranges

On Cross Segment Editing Rules

1. Complete the following field with *RANGE:
   - Value
     The system prompts you for the range from and to values.

2. On Value Selection, complete the following fields:
   - From Range
   - To Range

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection Values 01</td>
<td>The list of selection values associated with a data selection item in the Dream Writer. This list is generated by the use of the *VALUES keyword in data selection setup. Elements 1 and 2 are also used to contain the upper and lower value for the keyword *RANGE used by the data selection in the Dream Writer.</td>
</tr>
<tr>
<td>Selection Values 02</td>
<td>The list of selection values associated with a selection item in the Dream Writer. This list is generated by the use of the &quot;VALUES&quot; keyword in data selection set-up. Elements 1 and 2 of this array are also used to contain the upper and lower value for the keyword &quot;RANGE&quot; utilized by the data selection processing in the Dream Writer.</td>
</tr>
</tbody>
</table>

What You Should Know About

**Revising *RANGE**

To revise existing *RANGE entries, place the cursor on *RANGE and choose the Range and Values function.

**To copy a rule**

On Cross Segment Editing

1. Access Rules Copy Window (3).
2. Locate the configured item from which you want to copy a rule.
3. Do one of the following:
   - To select the line, choose the Select Value option.
   - To select the complete rule, choose the Select Group option.

What You Should Know About

**Calculated segment rules**
Calculated segment values appear in cross-segment editing rule error messages.

**Separating rules**
The system automatically separates rules with the line Next Edit Group after you enter all the rules.

**Multi-level configured items**
You can reference upper level items in a cross-segment editing rule.

**Setting up generic branch/plants**
You can define segments, rules, and configured items that are specific to a branch/plant specific or generic across all branch/plants.

A blank Branch/Plant field identifies a generic branch/plant.

If you don’t use the generic branch/plants, then segment, rule, and item information should be the same across branch/plants.

If you define generic branch/plants segments, you must also define generic cross-segment editing and assembly inclusion rules.

See Also

- Working with Error Messages (P4211)
Setting Up Custom Error Messages

You can create custom messages that override the system messages for a cross-segment editing rule.

To set up custom error messages

On Cross Segment Editing

1. Complete the following field with Y:
   - Text

2. Choose the Custom Text Message option (2).

3. On Configurator Custom Messages, type the text for the error message.

Reviewing Cross-Segment Editing Information

Review cross-segment editing information to help you maintain rules. For the item number and segment that you specify, review and work with all the cross-segment editing rules.
To review cross-segment editing information

On Cross Segment Where Used

Complete the following fields:
- Branch Plant
- Item Number
- Segment Number

See Also
- Printing Reports (P 32910)
Understand Derived Calculations

About Derived Calculations

For an assembly inclusion rule, you can define derived calculations to determine:

- Quantity of a part to include on the work order or sales order
- Value of a calculated segment
- Run or machine hour multiplier for a routing
- Price multiplier

You can use the following functions within a derived calculation:

- Algebraic Formulas
- Segment References
- Trigonometric and Logarithmic Functions
- Substrings
- Concatenations
- Referencing External Fields
- Referencing External Programs
- Calculating Smart Parts

Algebraic Formulas

Use algebraic formulas to combine different operations with the following operators: +, -, *, and /. You can embed calculations by enclosing them in parentheses. You can embed segment numbers in the formula to include segment values as part of the calculation.

For example, the following formula calculates the counter weight necessary so that the forklift will not tip over when its boom is extended to its tallest height with a full load:

<table>
<thead>
<tr>
<th>Formula</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Derived Calculation</td>
<td>S10 / (4 * (\cos(2 \times S30 \times 3.1416 / 360) / (3.1416^2)))</td>
</tr>
</tbody>
</table>
Segment References

You can reference any segment within a formula. To reference a segment within the same configured item, enter S and the segment number. For example:

<table>
<thead>
<tr>
<th>Reference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S3</td>
<td>Indicates segment three</td>
</tr>
</tbody>
</table>

To reference a segment from a different configured item, enter S, the segment number, and the configured item name. Enclose the item name within equal signs. For example:

<table>
<thead>
<tr>
<th>Reference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S3=Piston=</td>
<td>Indicates segment three of item Piston</td>
</tr>
</tbody>
</table>

When you reference another segment in a multi-level configured item, you can only reference upper levels.

Trigonometric and Logarithmic Functions

You can use trigonometric or logarithmic functions independently or as part of a complex formula.

The following trigonometric functions are available:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIN(1.5)</td>
<td>Indicates the sine of 1.5</td>
</tr>
<tr>
<td>COS(S3)</td>
<td>Indicates the cosine of segment three</td>
</tr>
<tr>
<td>TAN(S3)</td>
<td>Indicates the tangent of segment three</td>
</tr>
<tr>
<td>ARC(S3)</td>
<td>Indicates the arctangent of segment three</td>
</tr>
</tbody>
</table>

All of these values are expressed in radians.

The following logarithmic functions are available:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOG</td>
<td>Indicates log to base 10.</td>
</tr>
<tr>
<td>LN</td>
<td>Indicates natural log.</td>
</tr>
<tr>
<td>**</td>
<td>Indicates an exponent. For example, 2**5 represents 2 to the fifth power.</td>
</tr>
</tbody>
</table>
Substrings

You can use the SUBSTR (substring) function to include a portion of a larger string of characters in a formula.

To calculate a substring, you must reference the segment from which you want to take the substring, the starting position within the string where you want to begin referencing values, and the length of the string you want to reference. For example, if segment 10 is 400012 then:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUBSTR(S10,1,4)</td>
<td>Indicates that the substring from segment 10 starts at the first position of the string and includes the next 4 positions. The substring value is 4000.</td>
</tr>
<tr>
<td>SUBSTR(S10,5,2)</td>
<td>Indicates that the substring from segment 10 starts at the fifth position of the string and includes the next 2 positions. The substring value is 12.</td>
</tr>
</tbody>
</table>

Concatenations

You can use the CONCAT (concatenate) function to combine the values of two different segments. For example:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONCAT(S3,S4)</td>
<td>Combines the values of segments 3 and 4. If the segment value of segment 3 is 1001 and the value of segment 4 is WH (white), the concatenated value is 1001WH.</td>
</tr>
</tbody>
</table>

Referencing External Fields

You can select field values from the External Files Reference form to use in derived calculations. Choose a field from the following tables:

- F4101 - Item Master
- F4102 - Item Branch
- F41021 - Item Location
- F4105 - Cost Ledger
- F4106 - Base Price
- F0101 - Address Book Master
- F0301 - Customer Master
- F41002 - Unit of Measure Conversion
- F41092 - Supplemental Database
- **F46011 - Item/Unit of Measure Profile**

After you reference a field value, the information appears in the Derived Calculation field preceded by an ampersand (&). You can use the field independently or within a complex expression.

For rule types P, R, X and C, the system uses the component item number and branch from the rule to retrieve the appropriate tables.

The system uses the Address Book number to retrieve data from the Address Book or Billing Instructions tables.

When you reference a Supplemental Database field, you must also specify the data type. Enter the data type after the field as follows:

<table>
<thead>
<tr>
<th>Reference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&amp;T2AMTU(WD)</td>
<td>Indicates an amount field on the item supplemental database table, and the WD data type.</td>
</tr>
</tbody>
</table>

When you reference the Unit of Measure in Unit of Measure Conversion tables, you must specify the unit of measure in the same manner.

### Referencing External Programs

You can use an external program to define a calculation. Enter the name of the external program. You must also indicate EXTVAR in the Derived Calculations field. After the system runs the external program, it places the results in EXTVAR, a 30 character variable in the inclusion rule.

For P and R rules, the external program references the component number, component branch, and sold to number.

For C or X rules, the external program references the configured item number, branch/ plant, and sold to number.

The external program can also access and use the values of previously entered segments sorted in user indexes. The system passes the following parameters to the external program:

- Item number
- Branch/ Plant
- DSKITP, a comprehensive data structure that contains many different values.
- EXTVAR

### Calculating Smart Parts

For P and Q rules, you can build smart part numbers using the segment values from sales order entry. The system calculates smart parts in a similar manner to derived calculations, however the resulting smart part is an alphanumeric string. You must define smart part numbers in the Item Master (F4101) and Branch/ Plant (F4102) tables.
You can build a part number by using following functions:

- Segment referencing
- Substring
- Concatenation
- Literal text, for example the letter P in part number P165

Smart part formulas can define short, second or third part numbers. Smart parts use the part numbering symbol conventions defined in Branch/Plant Constants. For example, if the smart part formula uses the symbol to identify the third part number along with the third part number, the system would place the second part number on the sales order and work order detail line.

When you define a smart part, you can also use a derived calculation to determine the quantity of the smart part to use.

For example:

<table>
<thead>
<tr>
<th>Reference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>'P'S4</td>
<td>Indicates a smart part number P2000, when the value of segment 4 is 2000.</td>
</tr>
</tbody>
</table>
Set Up Assembly Inclusion Rules

Setting Up Assembly Inclusion Rules

You must set up assembly inclusion rules that process requested options and features from sales order entry into the specific components, operations, and calculated values that are necessary to build and price the configured item.

There are five types of assembly inclusion rules:

<table>
<thead>
<tr>
<th>Rule</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Component Part (P) Rules</td>
<td>Define the component parts to include on the sales order and work order parts list. You also define multi-level configured items with these rules. For example, if segment 10 equals 6000 and segment 30 is greater than or equal to 10, then use part F170, else use part F175.</td>
</tr>
<tr>
<td>Work Order Component Part (Q) Rules</td>
<td>Define the components to include on the work order parts list. The Process Work Orders program attaches the parts list. For example, if segment 10 equals standard, then include part R100 and part R105.</td>
</tr>
<tr>
<td>Pricing (X) Rules</td>
<td>Define the price/cost adjustment. The system processes X rules independently based on the kit pricing method you have selected. You should not set up cost adjustments when using work order-generated line types. For example, if segment 40 equals CUS, then adjust the price by $650.00.</td>
</tr>
<tr>
<td>Routing (R) Rules</td>
<td>Define the work order routing and routing operations. The Process Work Orders program attaches work order routings. You must first define the routings on Enter/Change Routing before you define routing rules. For example, if segment 40 equals STD, then use the routing for standard paint. Otherwise, use the routing for custom paint.</td>
</tr>
<tr>
<td>Calculation (C) Rules</td>
<td>Define the mathematical calculation for a configured item's calculated segments. You must first define the segment as calculated on Configured Item Segments.</td>
</tr>
</tbody>
</table>
Setting up assembly inclusion rules consists of the following tasks:

- Defining Assembly Inclusion Rules
- Locating Assembly Inclusion Rules

**Logic Statements**

For each assembly inclusion rule, you can define an “if/then/else” logic statement for many conditions. The following assembly inclusion rule illustrates:

If Segment 10 equals 6000, and segment 30 is greater than 10, then include part F170, else include part F175.

You can use the following conditions:

- If
- Then
- Else
- And
- Or

**Advanced Assembly Inclusion Rules**

For an assembly inclusion rule, you can define advanced assembly inclusion rules to:

- Expand the derived calculation formula
- Define smart parts
- Reference external fields
- Reference external programs
- Reference a table

**Derived Calculations**

For each rule type, you can define calculations for a specific segment to determine the following:

<table>
<thead>
<tr>
<th>Rule</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculation (C) Rules</td>
<td>The value for a calculated segment</td>
</tr>
<tr>
<td>Routing (R) Rules</td>
<td>Run or machine hours multiplier for a routing or routing step</td>
</tr>
<tr>
<td>Pricing (X) Rules</td>
<td>Price multiplier</td>
</tr>
<tr>
<td>Component (P and Q) Rules</td>
<td>Quantity multiplier (similar to quantity per assembly)</td>
</tr>
</tbody>
</table>

For each calculation, the following functions are available:

- Segment referencing
- Algebraic expressions
- Trigonometric functions
- Exponential/logarithmic functions
- A substring function to select a subset of values from a segment
- A concatenate function to combine values from two segments
- References to fields from other files
- Segment definition with a custom-written external program

You can define a derived calculation on either Assembly Inclusion Rules or Advanced Rules.

Understanding Smart Parts

For quantity rules (P rules and Q rules), you can build “smart part” numbers from the segment values that you entered on the sales order. The simplest form of a smart part is that the answer to a segment question is a part number. The system calculates smart parts in a similar manner to derived calculation string-related operations.

Referencing External Fields

As you define a derived calculation, you can include field values on External Files Reference. For example, a pricing assembly inclusion rule for FORKLIFT-A uses a field reference to retrieve a base price from the Base Price table (F4106).

Referencing External Programs

You can reference an external custom program for special calculations. This is useful if the calculation requires several steps or requires more characters than available.

Multi-Level Processing

If a configured item includes multiple levels, the system processes each component down the item hierarchy before processing across. This process determines the order in which segments appear during sales order entry.
For example, in the following configured item, forms appear during sales order entry in the order A, B, C, D, E:

```
Item A
  Segment 10
  Segment 20
  Segment 30

Item B
  Segment 10
  Segment 20
  Segment 30

Item C

Item D

Item E

Additional Items
```

Consider multi-level processing before you set up your rules, so that the system references segments for previously entered values. Use P type assembly inclusion rules to define your multi-level configured items. If you use configured items as components within multi-level configured items, ensure that the configured component items are unique.

**Referencing Table Names**

You can use advanced rules to reference a table that returns calculated segment values, prices, and parts to the assembly inclusion rules.

<table>
<thead>
<tr>
<th>Reference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referencing segments</td>
<td>For both Q and P rules, you can reference upper and lower level segments from assembly inclusion rules, tables and derived calculations.</td>
</tr>
</tbody>
</table>

**See Also**

- Set Up Configurator Smart Parts
- Working with Tables (P3281)
- Understand Derived Calculations (P3293)
Defining Assembly Inclusion Rules

Defining assembly inclusion rules consists of the following tasks:

- Defining unconditional rules
- Defining conditional rules
- Defining values
- Defining ranges
- Setting up advanced rules (optional)
- Copying rules (optional)

To define unconditional rules

Before you define conditional rules, you can define unconditional rules to include parts, adjustments, calculated values, or routing steps regardless of the values in segment questions.

On Assembly Inclusion

1. Complete the following fields:
   - Branch/Plant
   - Rule Type
   - Configured Item

2. Complete the following field with an asterisk:
- And/Or

3. Complete the following fields:
   - Item
   - Line Type

To define conditional rules

On Assembly Inclusion

1. Complete the following fields:
   - Branch/Plant
   - Rule Type
   - Configured Item
   - If
   - Bracket
   - Segment
   - Relationship
   - Values
   - Bracket
   - Then
   - Item
   - Operation Sequence
   - Line Type

2. Access More Details.
3. Complete the following fields:
   - Quantity
   - Effective From
   - Component Branch
   - Effective Thru

4. Complete the following optional fields:
   - Segment Item
   - Segment Branch
   - Issue Type Code
   - Price Rollup
   - Derived Calculation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branch/ Plant</td>
<td>A number that identifies a branch, plant, work center, or business unit. Form-specific information</td>
</tr>
<tr>
<td></td>
<td>You can define a generic or blank branch/plant for assembly inclusion rules and then use the rules for all branch/plants.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Rule Type</td>
<td>Designates the type of included components:</td>
</tr>
<tr>
<td></td>
<td>C Calculation</td>
</tr>
<tr>
<td></td>
<td>P Part List</td>
</tr>
<tr>
<td></td>
<td>Q Work Order Component</td>
</tr>
<tr>
<td></td>
<td>R Route Sheet</td>
</tr>
<tr>
<td></td>
<td>X Price/ Cost Adjustment</td>
</tr>
<tr>
<td>Configured Item</td>
<td>A number that the system assigns to an item. It can be in short, long, or 3rd item number format.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>Header: The configured item number for which assembly inclusion rules are being defined.</td>
</tr>
<tr>
<td></td>
<td>Detail: For P rules, this item is included in the parts list. For R rules, the routing for this item is copied.</td>
</tr>
<tr>
<td>And/ Or Selection</td>
<td>A code that determines whether compound data selection logic is based on an A = AND condition or an O = OR condition.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>For configuration management, you can include parts, prices, costs, or routings with the configured item. Additional values include:</td>
</tr>
<tr>
<td></td>
<td>I If</td>
</tr>
<tr>
<td></td>
<td>E Else</td>
</tr>
<tr>
<td></td>
<td>* Then</td>
</tr>
<tr>
<td></td>
<td>For example:</td>
</tr>
<tr>
<td></td>
<td>I     Seg 1 = A</td>
</tr>
<tr>
<td></td>
<td>*     Part B</td>
</tr>
<tr>
<td></td>
<td>E     Part C</td>
</tr>
<tr>
<td></td>
<td>E     Part D</td>
</tr>
<tr>
<td></td>
<td>If Seg 1 is A, include part B. If Seg 1 is not A, include part C and part D.</td>
</tr>
<tr>
<td>Price</td>
<td>The price charged for the unit of measure in the adjoining field. Use these fields, for example, if your primary unit of measure is EA (each), but you typically use a list price per box.</td>
</tr>
<tr>
<td>Cost</td>
<td>A user-defined cost the system uses based on information that you supply, which includes the name of the costing method and the method of calculation.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Op Seq</td>
<td>In routings, this number is used to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.</td>
</tr>
<tr>
<td></td>
<td>In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Control system uses this field in the backflush/preflush by operation process.</td>
</tr>
<tr>
<td></td>
<td>In engineering change orders, this number is used to sequence the assembly steps for the engineering change.</td>
</tr>
<tr>
<td></td>
<td>Skip To fields allow you to enter an operation sequence that you want to begin the display of information.</td>
</tr>
<tr>
<td></td>
<td>You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.</td>
</tr>
<tr>
<td></td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>For R rules, this value defines which routing step should be added to the configured item's work order routing.</td>
</tr>
<tr>
<td></td>
<td>For P and Q rules, this value controls the consumption of material during backflush or super backflush transactions.</td>
</tr>
<tr>
<td>Item Number - Unknown</td>
<td>The item number entered which can be in any of the three formats (short, long, or 3rd item number).</td>
</tr>
<tr>
<td>Format Entered</td>
<td>Form-specific information</td>
</tr>
<tr>
<td></td>
<td>The configured item number of the segment in the Assembly Inclusion Rule. Use this number to reference a previously selected segment.</td>
</tr>
<tr>
<td>Price Roll Up Flag</td>
<td>Determines whether the price/cost is rolled up into the parent item. The extended price/cost will be zero if the flag is set to roll up to the parent.</td>
</tr>
<tr>
<td></td>
<td>Y or 1 - Roll up price or cost to parent.</td>
</tr>
<tr>
<td></td>
<td>N or 0 - Separate price/cost add-on.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Effective From</td>
<td>A date that indicates one of the following:</td>
</tr>
<tr>
<td></td>
<td>▪ When a component part goes into effect on a bill of material</td>
</tr>
<tr>
<td></td>
<td>▪ When a routing step goes into effect as a sequence on the routing for an item</td>
</tr>
<tr>
<td></td>
<td>▪ When a rate schedule is in effect</td>
</tr>
<tr>
<td></td>
<td>The default is the current system date. You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in Product Costing, Shop Floor Control, and Capacity Requirements Planning. The Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.</td>
</tr>
<tr>
<td>Thru</td>
<td>A date that indicates one of the following:</td>
</tr>
<tr>
<td></td>
<td>▪ When a component part is no longer in effect on a bill of material</td>
</tr>
<tr>
<td></td>
<td>▪ When a routing step is no longer in effect as a sequence on the routing for an item</td>
</tr>
<tr>
<td></td>
<td>▪ When a rate schedule is no longer active</td>
</tr>
<tr>
<td></td>
<td>The default is December 31 of the default year defined in the Data Dictionary for Century Change Year. You can enter future effective dates so that the system plans for upcoming changes. Items that are no longer effective in the future can still be recorded and recognized in Product Costing, Shop Floor Control, and Capacity Requirements Planning. The Material Requirements Planning system determines valid components by effectivity dates, not by the bill of material revision level. Some forms display data based on the effectivity dates you enter.</td>
</tr>
<tr>
<td>Comp Branch</td>
<td>A secondary or higher level business unit. Sometimes used to reference a branch or plant with several departments or jobs subordinate to it.</td>
</tr>
<tr>
<td></td>
<td>Branch/ Plant - (MMCU)</td>
</tr>
<tr>
<td></td>
<td>Dept A - (MCU)</td>
</tr>
<tr>
<td></td>
<td>Dept B - (MCU)</td>
</tr>
<tr>
<td></td>
<td>Job 123 - (MCU)</td>
</tr>
</tbody>
</table>
### Field Explanation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
</table>
| Issue Type Code     | A code that defines how the system issues each component in the bill of material from stock. In shop floor control, it indicates how the system issues a part to a work order. Valid codes are:  
I Manual issue (default)  
F Floor stock (no issue)  
B Backflush (when part is reported as complete)  
P Preflush (when parts list is generated)  
U Super backflush (at pay-point operation)  
S Sub-contract item (send to supplier)  
Blank Shippable end item  
You can issue a component in more than one way within a specific branch/plant by using a different code on the bill of material and work order parts list. The bill of material code overrides the branch/plant value. |
| Print Part          | This field will determine if the Configurator part should print on the sales order and work order. The flag will be used in the Pick Slip, Invoice Print, Bill of Lading, and Print Parts List.  
Y Print on sales and work order  
N Do not print on sales and work order  
2 Print on sales order only  
3 Print on work order only  
You can also use 1 for Y and 0 for N. |
<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Derived Calculation</td>
<td>Defines an algebraic formula that calculates the quantity, price, hours or a value associated with a rule. For example:</td>
</tr>
<tr>
<td></td>
<td>Segment References</td>
</tr>
<tr>
<td></td>
<td>• S3 indicates segment 3.</td>
</tr>
<tr>
<td></td>
<td>• S3=Piston= indicates segment 3 in item Piston.</td>
</tr>
<tr>
<td></td>
<td>Trigonometric and Logarithmic Functions</td>
</tr>
<tr>
<td></td>
<td>• SIN(20) indicates the sine of 20.</td>
</tr>
<tr>
<td></td>
<td>• COS(S3) indicates the cosine of segment 3.</td>
</tr>
<tr>
<td></td>
<td>• TAN(S4) indicates the tangent of segment 4.</td>
</tr>
<tr>
<td></td>
<td>• ARC(S) indicates the arctangent of segment 3.</td>
</tr>
<tr>
<td></td>
<td>• LOG indicates log to base 10.</td>
</tr>
<tr>
<td></td>
<td>• LN indicates natural log.</td>
</tr>
<tr>
<td></td>
<td>• 2**5 indicates an exponent, 2 to the fifth power.</td>
</tr>
<tr>
<td>Substring</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• SUBSTR(S10,1,4) indicates that the substring from segment 10 starts at the first position of the string and includes the first 4 positions.</td>
</tr>
<tr>
<td>Concatenations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• CONCAT(S3,S4) combines the values of segments 3 and 4.</td>
</tr>
<tr>
<td>External Fields</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• To specify external fields from external files, use &amp; followed by the field name. For example, &amp;T2AMTU(WD) indicates an amount field on the Item Supplemental Database table, and the WD data type.</td>
</tr>
<tr>
<td>External Programs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• To define an external program for the calculation, enter the name of the external program and EXTVAR in the Derived Calculations field.</td>
</tr>
<tr>
<td>Smart Parts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• PS4 indicates a smart part number P2000 when the value of segment 4 is 2000.</td>
</tr>
<tr>
<td>Quantity - Standard</td>
<td>The number of units to which the system applies the transaction.</td>
</tr>
<tr>
<td>Required Quantity</td>
<td></td>
</tr>
</tbody>
</table>
What You Should Know About

Price rollup
During sales order entry processing of pricing rules, the system compares the line type of the configured item on the sales order to “true” x rule line types. If the line types match, the price adjustment is reflected in the configured parent’s unit price. If the line types are different, the price rollup field is used to determine if the price adjustment is reflected in the parent’s unit price.

Revising lines
You can use the insert line option and the delete line option to revise the assembly inclusion rules.

Assembly inclusion rule processing
During sales order entry, the system processes each assembly inclusion rule independently by rule type from top to bottom in the following order:
- C rules
- Cross-segment editing rules
- P rules
- Q rules (if necessary)
- R rules (if necessary)
- X rules

To define values
On Assembly Inclusion
1. Complete the following field with *VALUE:
   - Value
     The system prompts you to work with *VALUE entries on Value Selection.
2. On Value Selection, complete the following field:
   - Value

What You Should Know About

Revising *VALUE

To revise existing *VALUE entries, place the cursor on *VALUE and choose the Range/Values function.

To define ranges

On Assembly Inclusion

1. Complete the following field with *RANGE:
   - Value

   The system prompts you for all new and changed rules containing a *RANGE.
2. On Value Selection, complete the following fields:
   - From Range
   - To Range

**What You Should Know About**

**Revising *RANGE**

To revise existing *RANGE entries, place the cursor on *RANGE and choose the Range/Values function.

**To set up advanced rules**

On Assembly Inclusion Rules

1. **Access Advanced Rule Functions.**

2. On Advanced Rule Functions, complete one or more of the following fields:
   - Derived Calculation
   - External Program
Set Up Assembly Inclusion Rules

### To copy rules

On Assembly Inclusion

1. On a blank line, access Rules Copy Window.

2. On Rules Copy Window, locate the configured item from which you want to copy a rule.

3. Do one of the following:
   - To select a line, choose the Select Value option.
   - To select the complete rule, choose the Select Group option.

### Processing Options

See Assembly Inclusion Rules (P3293).

### Locating Assembly Inclusion Rules

You review assembly inclusion rule information to help you maintain these rules. You can determine the effect of component changes such as shortages and substitutions, and determine the effect of changes to valid segment values. For example, if a vendor discontinues a paint color, you can determine how many configurations will be affected.

Locating assembly inclusion rules consists of the following tasks:

- Locating component information
- Locating segment information

### See Also

- Printing Reports (P32910)
To locate component information

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Component Where Used

On Component Where Used

Complete the following fields:
Branch Plant
Rule Type
Component Item
To locate segment information

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose AIR Segment Where Used

On AIR Segment Where Used

Complete the following fields:
Branch Plant
Rule Type
Item Number
Segment Number
Set Up the Configurator Subsystem

Setting Up the Subsystem

The subsystem functionality is used in Configurator to run the Process Work Orders program (P31410) simultaneously when Configurator orders are entered and processed in Sales Order Entry (P4211). When you enter a configured sales order through P4211, the subsystem signals the Process Work Orders Program (P31410) to update the related work order as well. At the same time, the P31410 will attach the work order parts list and routing, and cost the configured item.

This instruction contains the following steps:

- To set up the Configurator subsystem
- To activate the subsystem
- To stop the subsystem
- To troubleshoot the subsystem

To set up the Configurator subsystem

On Define Subsystem

1. Press F4 to access the detail area.
2. Complete the following fields, if they are not already populated:
   - Program – Enter P31410
   - Version – Enter the valid DREAM Writer for P31410
   - Environment – Enter the environment in which the subsystem operates

3. Set the parameters:
   - 1. Leave blank with a length of 15
   - 2. Set to 1 with a length of 1
   - 3. Enter the data library with a length of 10
   - 4. Leave blank with a length of 8

4. Enter J31410ST in the Stop Program field
To activate the subsystem

On Define Subsystem.

Enter 1 in the Option field and press Enter.

To stop the subsystem

On the Advanced Configurator menu (G3231)
Select Stop Subsystem, or do one of the following:
1. Type 33 on the command line and press Enter to open Work with Submitted Jobs.
2. Enter 4 in the Option field next to any subsystem (J31410) job with an Active status.
3. Press Enter.

To troubleshoot the subsystem

If the subsystem will not stay started, do the following:
1. Type WRKDTAQ DTAQPWO on the command line.
2. Select option 4 to delete the data queue.
3. Restart the subsystem.

See Also

- Working with the Subsystem (P40105) in the Sales Order Management Guide
- Process Work Orders
Understand Tables

About Tables

A table is a collection of data that you define for configured items. An assembly inclusion rule references a table. When the system processes rules during sales order entry and work order generation, it uses the table reference and table data to retrieve component parts and calculated values.

Note: The tables used for matrix processing within the Configuration Management system are not User Defined Code tables or file tables.

You can define the following tables that correspond to the matching assembly inclusion rule types:

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pricing table (Type X)</td>
<td>Defines a price table that returns one numeric value.</td>
</tr>
<tr>
<td>Part tables (Types P and Q)</td>
<td>Define part tables that can return multiple alphanumeric values.</td>
</tr>
<tr>
<td>Calculated value table (Type C)</td>
<td>Defines a calculated segment table that can return numeric or alphanumeric values as defined on Configured Item Segments.</td>
</tr>
</tbody>
</table>

Setting up tables adds time to the setup process, but tables can dramatically reduce the number of assembly inclusion rules and their complexity, thus improving processing time.

Because a table might contain many segments and multiple return values, you must decide how the table information appears before you can review table information. Use a table key to control which portion of the table appears. You define a key with enough segment values so that table values appear in a column and row format. The information defined on Table Key controls which table values appear on Table Detail.

The key is a combination of segment answers that the system uses to access the table and return the associated values. You can define up to ten keys to determine the dimensions of the table.
Understand Tables

On Table Keys, you can specify segment values in the following ways:

- Entering the specific value
- Choosing from available values (if table is already defined)
- Entering an asterisk at every segment to select from available segment values in the sequence that you define.

On Table Keys, you can set up several types of locks that control how table values appear:

- Exact lock - you define all segment values
- Column lock - you define all segment values but the last
- Table lock - you define all segment values but the last two (this is only available for tables that return single values)

The amount of table information that subsequently appears on Table Detail depends on two factors:

- The number of segments defined on Table Definition
- The number of return values you defined on Table Definition

The following examples illustrate some of the different methods for working with table values.

Example: Multiple Segments, Exact Lock

On Table Keys, define the values for each segment. A single row that represents the locked value for the last segment appears on Table Detail. The columns represent the multiple values that you defined for the table.
Enter a specific value in the value field.

Example: Multiple Segments, Column Lock

On Table Keys, define all segment values except for the last segment. Rows which represent values for the last segment, and columns which represent multiple table values appear on Table Values.

You can scroll to the left and right, and page up and down to review the table values.
Enter a number value to receive a list
Set Up Tables

About Tables

A configured rules table is a collection of data that you define for a configured item. An assembly inclusion rule references a table. When the system processes rules during sales order entry and work order generation, it uses the table reference and table data to retrieve component parts, calculated values, or price adjustments.

The tables used for matrix processing within the Configuration Management system are not User Defined Code tables or file tables.

You can define the following tables that correspond to the matching assembly inclusion rule types:

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pricing table (Type X)</td>
<td>Defines a price table that returns one numeric value.</td>
</tr>
<tr>
<td>Part tables (Types P and Q)</td>
<td>Define part tables that can return multiple alphanumeric values.</td>
</tr>
<tr>
<td>Calculated value table (Type C)</td>
<td>Defines a calculated segment table that can return numeric or alphanumeric values as defined on Configured Item Segments.</td>
</tr>
</tbody>
</table>

Setting up tables adds time to the setup process. However tables can dramatically reduce the number of assembly inclusion rules and their complexity, thus improving processing time.

Because a table might contain many segments and values, you must decide how the table information appears before you can review table information. As you work with table information, you can set a processing option for copying rows of data to speed data entry.

This section contains the following:

- Setting Up Tables
- Setting Up Table Dimensions
- Setting Up Configured Item Cross-Reference
- Setting Up Table Values
- Linking a Table to an Assembly Inclusion Rule
- Printing Table Information
Setting Up Tables

Assembly inclusion rules reference tables which you define to return calculated segment values, prices and component parts. The table type should be the same as the assembly inclusion rule type that accesses it.

Setting up tables consists of the following tasks:

- Setting up table dimensions
- Setting up configured item cross-reference
- Setting up table values
- Linking a table to an assembly inclusion rule
- Printing table information

Setting Up Table Dimensions

![From Configurator (G32), enter 29 From Configurator Setup (G3241), choose Table Definition]

For each table, you must define the:

- Table name in user defined code table 32/TN
- Table dimensions, including:
  - Table type
  - Number of segments that specify the key to the table
  - Number of values it will return

You define table names on a user defined code table. However, the Configuration Management data table is not a user defined code table.
To set up table dimensions

On Table Definition


2. On User Defined Code Revisions, complete the following fields:
   - Character Code
   - Description
3. Access Table Definition.

4. On Table Definition, complete the following fields:
   - Branch/Plant
   - Table Type
   - Rules Table Name
   - Table Description
   - Number of Segments
   - Number of Table Values

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Type</td>
<td>Designates the type of rule table. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>C Calculated values</td>
</tr>
<tr>
<td></td>
<td>P Part list (on sales order and work order)</td>
</tr>
<tr>
<td></td>
<td>Q Work order component (on work order only)</td>
</tr>
<tr>
<td></td>
<td>X Price/ Cost adjustment</td>
</tr>
<tr>
<td>Rules Table Name</td>
<td>You must define table names in user defined code table 32/ TN. A rule table is a collection of data that is set up to minimize the number of assembly inclusion rules you need for a configured item. A rule table can be accessed by 1 to 10 keys and can return up to 99 values. When you reference a rule table in an Assembly Inclusion Rule, the system uses the rule keys to read the rule table and retrieve the values associated with the table. For example, if you defined segment 10 to be the color of an item, you could set the table to retrieve item Red Component if the customer enters Red for segment 10. In this example, the table would be:</td>
</tr>
<tr>
<td></td>
<td>Item Color = Value</td>
</tr>
<tr>
<td></td>
<td>Red = RED COMPONENT</td>
</tr>
<tr>
<td></td>
<td>The table would read: If the color segment value = red, then use item number RED COMPONENT on the configured item sales order and work order parts list.</td>
</tr>
<tr>
<td>Number of Segments</td>
<td>Indicates how many keys are used to access the table. Key values must be on the current level or a previous level of the configured item.</td>
</tr>
<tr>
<td>Number of Table Values</td>
<td>The Number of Values tells the system how many values should be returned from the rule table when a match is found on the table keys. If you enter more than one return value for a C (calculated) rule, you must indicate the segment numbers to return the values to.</td>
</tr>
</tbody>
</table>
What You Should Know About

Deleting table definitions and table values

You can delete a table value at the intersection of the row and column. If you delete a table definition, the system also removes the related table values.

Processing Options

See Rule Table Definition (P3281).

Setting Up Configured Item Cross-Reference

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Configured Item Cross Reference

After you define a table, you must associate it with a configured item and define the specific segments that access it. To create a cross-reference, the number of segments that you specify must equal the number of segments that you defined for the table.

You can also specify a segment that accesses a different configuration level.

Multiple configured items can reference a single table, and a single configured item can reference multiple tables.

To set up a configured item cross-reference

On Configured Item Cross Reference

Complete the following fields:
<table>
<thead>
<tr>
<th>Branch/ Plant</th>
<th>Table Type</th>
<th>Table Name</th>
<th>Configured Item</th>
<th>Segment</th>
<th>Segment Item</th>
<th>Segment Branch</th>
</tr>
</thead>
</table>

**What You Should Know About**

**Generic cross-references**
You can enter an item "ALL" to define a generic cross-reference for all configured items. If you use "ALL", you must use the same segment numbers across all configured items. This defines keys for all configured items that access the table.

**Using multiple return values with a calculation table**
When you define a calculation table with multiple return values, you must specify on Value Definition the segment numbers that will be populated with table values.

**Processing Options**

See [Configured Item Cross-Reference (P3282)].

**Setting Up Table Values**

- From Configurator (G32), enter 29
- From Configurator Setup (G3241), choose Table Keys

To enter table values quickly, consider setting a processing option to enable row copying.
To set up table values

On Table Keys

1. Complete the following fields:
   - Branch/Plant
   - Table Type
   - Table Name
2. Complete the following field for the first segment:
   - Value
3. Complete the following field for the last segment:
   - Value
4. Access Table Values.
5. On Table Values, complete the following field for each segment:
   - Value

6. Access the detail area.

7. Complete the following fields:
   - Quantity
   - Unit of Measure
### Field Explanation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table</td>
<td>The Table Segment Value is a value used as a key to a table.</td>
</tr>
<tr>
<td>Rules Table Value</td>
<td>The Rules Table Value is the value that is returned from a rules table.</td>
</tr>
<tr>
<td>Item Number - Unknown</td>
<td>The item number entered which can be in any of the three formats (short, long, or 3rd item number).</td>
</tr>
<tr>
<td>Format Entered</td>
<td>The actual amount. Debits are always entered as plus (+), and credits are entered as minus (-). You may enter decimals, dollar signs, and commas. The amount field will be examined and any non-significant symbols will be removed. Minus signs must be entered as a trailing figure. For example, the amount 5,000.01- would be interpreted as a credit of 5000.01.</td>
</tr>
<tr>
<td>Amount</td>
<td></td>
</tr>
</tbody>
</table>

### See Also

- Understand Tables

### Processing Options

See **Table Detail (P3283)**.
Linking a Table to an Assembly Inclusion Rule

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Assembly Inclusion Rules

After you have defined a table and the segment that accesses its values, you must link the table to the assembly inclusion rule for that segment.

To link a table to an assembly inclusion rule

On Assembly Inclusion

1. Access Advanced Rule Functions for the segment that you want to link to a table.

2. On Advanced Rule Functions, complete the following field:
   - TableName
Printing Table Information

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Table Report

Print the Table Report to review the table segments and values for the table name and table type that you specify.

<table>
<thead>
<tr>
<th>Power Type</th>
<th>Value</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>BATTERY</td>
<td>F105</td>
<td>F130</td>
</tr>
<tr>
<td>GAS</td>
<td>F105</td>
<td>F120</td>
</tr>
<tr>
<td>PROPANE</td>
<td>F105</td>
<td>F125</td>
</tr>
<tr>
<td>TRANS</td>
<td>F105</td>
<td>F185</td>
</tr>
<tr>
<td>WARP</td>
<td>F105</td>
<td>F180</td>
</tr>
</tbody>
</table>

Rules Table Name . . LIFT
Rules Table Type . . P
Lift Rating 2080
Page 2
Data 2/20/17
Branch M30
Printing Reports

You can review the following information about a configured item with available Configuration Management reports:

- Where segments are used in configured items
- Assembly inclusion rules
- Cross-segment editing rules

Use these reports to analyze demand for options and features and to maintain rules.

Printing reports consists of the following tasks:

- Printing Segment Information
- Printing Cross-Segment Editing Rules
- Printing Assembly Inclusion Rules

Printing Segment Information

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Configured Item Segments

Print this report to review the segments for the configured item that you specify.

To print segment information

On Configured Item Segments

1. Inquire on the configured item.
2. Press F21 to print the report.

Note: DREAM Writer is set up to print all items. You can set the 2nd Item Number in Data Selection to the configured item's item number to view segments for that item only.
Printing Cross-Segment Editing Rules

From Configurator (G32), enter 29
From Configurator Setup (G3241), choose Cross Segment Editing

Print this report to review all cross-segment editing rules for the configured item that you specify.

To print cross-segment editing rules

On Cross Segment Editing
1. Inquire on the configured item.
2. Press F21 to print the report.

Note: DREAM Writer is set up to print all items. You can set the 2nd Item Number in Data Selection to the configured item's item number to view segments for that item only.
## Printing Assembly Inclusion Rules

| Rule No | Seq No | Cond (   Segment Description   Rel        Value          ) | Seg   Segment Description   Req Rel        Value         Text |
|---------|--------|----------------------------------------------------------|--------|-----------------|--------------------------|
| 1       | 1      | If 10 Lift Rating EQ 6000                                | 20 Power Type R EQ "VALUE" Y               |
| 2       | 1      | If 10 Lift Rating LE 4000                                | 20 Power Type EQ PROPANE                    |
| 3       | 1      | And 20 Power Type EQ PROPANE                              | 50 Propane Tank R EQ 50                    |
| 4       | 1      | If 20 Power Type NE PROPANE                              | 50 Propane Tank O EQ "BLANK" Y             |

A 6000 LB capacity Forklift requires a gas or propane engine.

Next Edit Group.

### Printing Assembly Inclusion Rules

From Configurator (G32), enter 29

From Configurator Setup (G3241), choose Assembly Inclusion Rule Report

Print this report to review all the assembly inclusion rules for the configured item that you specify.

**To print assembly inclusion rules**

On Assembly/Inclusion Rule Report

1. Inquire on the configured item.
2. Press F21 to print the report.

**Note:** DREAM Writer is set up to print all items. You can set the 2nd Item Number in Data Selection to the configured item's item number to view segments for that item only.
Assembly Inclusion Rules

Parts List

Product Family . FORKLIFT-A
Forklift, New Improved

Branch. M30
Configurator Rule P

IF Condition: THEN Include:

<table>
<thead>
<tr>
<th>Cond</th>
<th>Seg</th>
<th>Segment Description</th>
<th>Rel</th>
<th>Value</th>
<th>Component Item Number</th>
<th>Description</th>
<th>Ln</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use</td>
<td></td>
<td>Use</td>
<td>Qty</td>
<td>1 EA</td>
<td>F165</td>
<td>Countersweights</td>
<td>S</td>
</tr>
<tr>
<td>Use</td>
<td>DC (S60/50)+1</td>
<td>Use</td>
<td></td>
<td>Rule No 1</td>
<td>Seq No 1</td>
<td>Forklift Boom</td>
<td>W</td>
</tr>
<tr>
<td>Use</td>
<td></td>
<td>Use</td>
<td>Qty</td>
<td>1 EA</td>
<td>F175</td>
<td>Hard Rubber Tire</td>
<td>S</td>
</tr>
<tr>
<td>Use</td>
<td></td>
<td>Use</td>
<td>Qty</td>
<td>4 EA</td>
<td>F135</td>
<td>8 Ft Boom</td>
<td>S</td>
</tr>
<tr>
<td>Use</td>
<td></td>
<td>Use</td>
<td>Qty</td>
<td>6 EA</td>
<td>F140</td>
<td>10 Ft Boom</td>
<td>S</td>
</tr>
</tbody>
</table>

Processing Options

See Rules Table Print (P3283P).
3 Sales Orders
Overview to Configured Item Sales Orders

Objectives

- To enter a sales order for a configured item

About Sales Orders

After you have set up the segments, cross-segment editing rules, and assembly inclusion rules for a configured item, you can enter a sales order for the configured item.

When you enter a sales order for a configured item, the Configuration Management system automatically prompts you to enter values for the segments of that configured item. You set a processing option to select from the following sales order entry modes:

- Assisted mode
- Assisted prompt mode
- Text mode

The system edits each segment value against user defined code tables, ranges and numeric specifications. The Sales Order Entry program also processes cross-segment editing rules to validate feature and option compatibility. If there are no errors, the system processes the segment values according to the assembly inclusion rules.

See Also

- Working with Header Information (P4211) in the Sales Order Management Guide
- Working with Detail Information (P4211) in the Sales Order Management Guide
Work with Configured Item Sales Orders

Working with Configured Item Sales Orders

You can enter a sales order for a configured item using one of the following methods:

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text mode</td>
<td>You can enter the segments as a string of characters separated by the segment delimiter. While using text mode, you can access both assisted prompt mode and assisted mode.</td>
</tr>
<tr>
<td>Assisted mode</td>
<td>All of the segments appear on a form with default values for each. You can select other values or accept the defaults.</td>
</tr>
<tr>
<td>Assisted prompt mode</td>
<td>The segments appear on one form and the choices for each segment appear on another. After you select values for all the segments, your choices appear on the first form. If you enter a multi-level configured item, the forms appear for each lower level item.</td>
</tr>
</tbody>
</table>

Working with configured item sales orders consists of the following tasks:

- Entering a Sales Order in Text Mode
- Entering a Sales Order in Assisted Mode
- Entering a Sales Order in Assisted Prompt Mode
- Working with Error Messages
- Reviewing Configured Text
- Revising a Sales Order for a Configured Item
- Converting Sales Quotes for Configured Items

Before You Begin

- Set the processing option for the work order line type to create work orders or define the W line type in each configured item's branch/plant record. If you leave the processing option blank, the system supplies the line type from the branch/plant.
- Verify that you have set the processing option to the appropriate sales order entry mode.
### Entering a Sales Order in Text Mode

After you have defined the sales order header with customer information, enter the configured item sales order in the sales order detail.

Entering a sales order in text mode consists of the following tasks:

- Entering item and customer information
- Entering a previously ordered configured item (optional)

#### To enter item and customer information

**On Sales Order Entry**

1. Complete the following required fields:
   - Sold To
   - Branch/ Plant
   - Quantity

2. Complete the following field with a configured item:
   - Item
   
   The ATO Specification Text Format form appears.
3. On ATO Specification Format, complete the following field:
   - Enter Segment Values

To enter a previously ordered configured item


2. On Configured String History, choose a configured string.

3. Revise the string as necessary and press Enter.
### Field Explanation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sold To</td>
<td>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.</td>
</tr>
<tr>
<td>Branch/Plant</td>
<td>A number that identifies a branch, plant, work center, or business unit.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The quantity of units affected by this transaction.</td>
</tr>
<tr>
<td>Item</td>
<td>A number that the system assigns to an item. It can be in short, long, or 3rd item number format.</td>
</tr>
<tr>
<td>ATO Coded Specification</td>
<td>This window will allow you to enter specific values for the segments making up a configured item. Segment values are separated by a special character, called the segment delimiter.</td>
</tr>
<tr>
<td>Text Format Entr</td>
<td></td>
</tr>
</tbody>
</table>

### Entering a Sales Order in Assisted Mode

**From Manufacturing Systems (G3), choose Configurator Operations**

**From Configurator (G32), choose Enter/Change Sales Order**

Entering a sales order in assisted mode consists of the following tasks:

- Entering item and customer information
- Entering a previously ordered configured item (optional)
To enter item and customer information

On Sales Order Entry

1. Complete the following required fields:
   - Sold To
   - Branch/Plant
   - Quantity

2. Complete the following field with a configured item:
   - Item

   The Configured Item Specifications form displays.

3. Do one of the following:
   - To accept the default values, press Enter.
To select a segment value, access Segment Values Selection for a specific segment and select a value.

4. Repeat step 3 for the remaining lower level configured items.

To enter a previously ordered configured item

1. On Configured Item Specifications, choose the Configured History function.

2. On Configured String History, choose a configured string.

3. Revise the string as necessary and press Enter.
Entering a Sales Order in Assisted Prompt Mode

From Manufacturing Systems (G3), choose Configurator Operations.
From Configurator (G32), choose Enter/Change Sales Order.

Entering a sales order in assisted prompt mode consists of the following tasks:

- Entering item and customer information
- Entering a previously ordered configured item (optional)

To enter item and customer information

On Enter/Change Sales Order

1. Complete the following required fields:
   - Sold To
   - Branch/Plant
   - Quantity
   - Item

The system prompts you to enter segment values by displaying a series of Segment Value Selection forms.
2. On Segment Value Selection, do one of the following:
   - Select a value from the list
   - Press Enter to accept the default value
3. Repeat step 2 for the remaining segments and lower level items.
4. To process the sales order, press Enter.
5. On Sales Order Entry, locate the sales order to display the individual line items.

To enter a previously ordered configured item

1. Access Configured String History.
2. On Configured String History, choose configured string.

3. Revise the string as necessary and press Enter.

What You Should Know About

**Vocabulary Overrides**

Vocabulary overrides enable you to change the text on forms and reports. On the Configured Item Specification form (V3294), you can use vocabulary overrides to change constants defined for rule processing components including variable name, string delimiter, and field name identifier.

See Working with Vocabulary Overrides in the Common Foundation Guide.

**Interbranch sales**

You can enter a configured item sales order to fill demand from a warehouse other than from the one where the order is placed. However the following functions are not supported:

- Pricing (X) rules for interbranch sales
- Transfer orders for configured items

Interbranch orders allow a branch to receive the order but supply the item directly from another branch. These orders can support markups between the branches, without inventory passing through the branch that received the order. The system does not support interbranch sales orders for configured items or pricing (X) rules.

See Working With Detail Information in the Sales Order Management Guide.
Preference profiles

Configuration Management supports most preference profiles. Preference profiles help you automate the sales order entry process. Use a preference profile to define information that is consistent for a customer, customer group, configured item, or configured item group. Preference profiles are not supported for multi-branch commitments.

See Working With Preferences in the Sales Order Management Guide.

Multi-currency

Pricing (X) rules are applied to foreign currency sales orders. The system processes price adjustments as a base currency amount and converts the amount to a different currency amount if necessary.

Commitments

Soft commitments are added for a configured parent item with associated work orders. Component parts related to the configured parent are committed by the Process Work Orders program.

Trade discounts

The Sales Order Management system does not support trade discounts for configured items.

Additional order processing

For configured items, the Sales Order Management system does not support the following additional order processing:

- Credit orders
- Blanket orders
- Transfer orders
- Drop ship orders

Weight calculation

If you have defined a conversion factor for primary UOM to weight UOM in the Item Master, then the Sales Order Entry program calculates the weight of the component parts to determine the parent weight. This calculation affects the following processes in your business flow:

- Shipping manifest requirements
- Freight charge calculations
- Advanced pricing requirements

Base weight conversion to which component weights will be added must be defined at the parent configured item level. In addition, item conversions to the parent weight UOM must be defined for each component. If no item conversion is found, the program looks to the Standard UOM Conversion table.

Components of a parent configured item that are also Stocking Type C items are included in the weight rollup to the parent.
Working with Error Messages

During sales order entry, the system checks the values that you enter against the cross-segment editing rules and configured item segments. The system verifies that you have not entered any values that violate the editing rules. If a segment value violates an editing rule, either a hard or a soft error message appears.

Working with error messages consists of the following tasks:

- Working with hard error messages
- Working with soft error messages

To work with hard error messages

On Configurator Rules

1. Press F3 to return to Configured Item Specifications.
2. Select a different segment value.

To work with soft error messages

On Configurator Rules

Do one of the following:

To change the segment value, return to Configured Item Specifications and select a different segment value.

To override the error message, choose the Accept Optional Message function.

See Also

- Cross Segment Editing Rules (P3292)
Reviewing Configured Text

You can review the configured text that you defined on Configured Item Segments. Configured text can include:

- Configured parent item’s part number
- Segment number
- Segment description
- Segment value
- Associated user defined code table value description

To review configured text

On Sales Order Entry

1. Locate the sales order for the configured item.
2. Access the Associated Text form.

See Also

- For more information about working with associated text, see Working With Associated Text (V 401) in the Sales Order Management Guide.
Revising a Sales Order for a Configured Item

From Manufacturing Systems (G3), choose Configurator Operations
From Configurator (G32), choose Enter/Change Sales Order

After you have entered a sales order, you can change the following information:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>Changes are reflected in the sales order and work order.</td>
</tr>
<tr>
<td>Segment value</td>
<td>Changes are reflected in the sales order and the work order.</td>
</tr>
<tr>
<td>Pick date</td>
<td>The system recalculates work order start dates based on lead times.</td>
</tr>
</tbody>
</table>

If you change the sales order after work has been started on the associated work order, the work order status will change, but the parts list and routing will not be affected. You can use constants to define the status beyond which changes will no longer affect the related work order. If the work order status is greater than or equal to the value set on Configurator Constants, the system will not reflect the changes on the work order.

**Note:** Configuration Management supports multi-level backscheduling when you change the pick date on a sales order.

To revise the sales order

On Sales Order Entry

1. Locate the sales order for the configured item.
2. Choose the Configured Item Change Processing option.

3. On Multi-Level Product Selection, choose the item that you need to revise.


5. On Configured Item Specifications, change the segment value and press Enter. The Sales Order Entry form displays the changes.

What You Should Know About

Revising a sales order  You can also revise a sales order by entering an asterisk in the Quantity field.

See Also

- Setting up Constants (P3209)
Converting Sales Quotes for Configured Items

From Manufacturing Systems (G3), choose Configurator Operations
From Configurator (G32), choose Enter/Change Sales Order

You can enter a sales quote for a configured item and later convert the sales quote into a sales order.

Sales quotes are controlled by two Configuration Management constants. You must:

- Specify the type of sales quote to use to prevent work orders from being generated for quotes.
- Set up quote costing based on manufacturing net added costing.

You enter a sales quote the same way as you enter a sales order, except that the document type is automatically set for sales quotes.

Before You Begin

- Set the Configurator Constants for sales quotes

To convert a sales quote into a sales order

On Enter/Change Sales Quote

1. Locate the sales quote.
2. Choose the Create/Duplicate a Sales order function.
3. Process the sales order.
See Also

- Setting up Constants (P3209)

Processing Options

See *Sales Order Entry (P4211).*
4 Configured Items
Overview to Configured Items

Objectives

- To create a work order for a configured item
- To process a configured item's work order

About Configured Items

After you enter configured item information during sales order entry, you can work with configured items in other programs within JD Edwards World Manufacturing and Distribution systems.

Working with configured items consists of the following:

- Processing work orders (required)
- Working with configured string history
- Understanding configured items in Manufacturing systems
- Understanding configured items in Distribution systems
Process Work Orders

Processing Work Orders

From Manufacturing Systems (G3), choose Configurator Operations.
From Configurator (G32), choose Work Order Processing.

After you have entered configured item sales orders and have created work order headers, you must run the Work Order Generation program to perform the following:

- Generate the work order parts list from the sales order and P type assembly inclusion rules.
- Include additional parts on the work order from Q type assembly inclusion rules.
- Create standard costs for configured items using a sort sequence that is unique to the configured item based on components and attached routings.
- Create the work order routing instructions from the R type assembly inclusion rules.
- Commit inventory.
- Back-schedule configured routings.
- Create one work order for each configured sales order line item. You can also create multiple work orders for a sales order line item. This program does not consolidate work orders for configured items.
- Attach the generic text from a configured item routing to the work order routing.

You can use either subsystem or batch processing of the Work Order Generation program. Batch processing occurs when you run the program. Subsystem processing occurs during sales order entry. However, subsystem processing does not produce shop floor paperwork. Subsystem processing is appropriate for new sales orders, not for sales order changes.

Note: For both batch and subsystem processing of Work Order Generation, the sort sequence must be descending by work order number.

Before You Begin

- Set Configurator Constants for branch or subsystem processing
- Set processing options for the Work Order Generation program for configured item processing
To use subsystem processing

On Define Subsystem

Complete the following field:

Option

What You Should Know About

Reprocessing a work order
You can run the Work Order Generation program again to reattach the parts list and routing to a configured item.

Recosting a work order
You can change a work order’s parts list and routing and run Work Order Generation again to recost the work order. However, this process eliminates the planned variance for the work order.

Revising the sales order
If you change the sales order after work has been started on the work order, the work order status will change, but the parts list and routing are not affected. Use Configurator Constants to define the status beyond which changes will no longer affect the related work order other than a change in status.
Calculating lead times

Work Order Generation calculates each operation’s start and end dates and the work order’s start date. Work Order Generation back scheduling uses fixed or variable lead times that you have defined on Item Location for the work order start date. Because variable lead times depend on how the item is configured, you must enter lead times manually on Item Location.

Work Order Generation calculates lead times for multi-level configured items on a multi-level basis, but Leadtime Rollup does not support configured items.

Updating standard costs

Work Order Generation determines a configured item’s standard cost from the configured parts list and routing and stores the costs in the Work Order Variance table. This standard cost is also updated to the associated sales order detail line.

Updating sales orders

Use a processing option to control updating the related sales order detail line status.

Starting the subsystem

You can also choose the Start Subsystem menu option.

Stopping the subsystem

You can also choose the Stop Subsystem menu option.

Outside operations

Work Order Generation dynamically calculates costs for outside operations if a configured item’s work order includes outside operations.

Processing Options

See "Generate and Print Configured Work Orders (Subsystem) (P31410)."

See Also

- Working with the Subsystem (P40105) in the Sales Order Management Guide
- Processing Work Orders (P31410) in the Shop Floor Control Guide
- Set Up the Configurator Subsystem in the Configuration Management Guide
Work with Configured String History

Working with Configured String History

You can generate an additional history of all configured strings that customers order. Review this history by customer and item to analyze sales.

Working with configured string history consists of the following tasks:

- Generating the Configured String History
- Reviewing the Configured String History

Generating the Configured String History

From Manufacturing Systems (G3), choose Configurator Operations
From Configurator (G32), choose Create Segment Value History

For the sales orders you select, the Create Segment Value History program:

- Retrieves the configured string from the Configured String History table (F3294)
- Separates the string
- Generates a record for each segment value
- Stores the information in the Configured String Segments table (F32942)

You can use this history information to generate custom reports and inquiries.

Note: The system does not generate the Configured String History table (F3295) automatically. You should run the Create Segment Value History program before you can review the history.

Reviewing the Configured String History

From Manufacturing Systems (G3), choose Configurator Operations
From Configurator (G32), choose Configured String History

You can review the configured string history to locate previously ordered configurations at any level of a configured item. The history includes information about customers, orders, price, and cost. You don’t have to generate the string history for this review.

You can also view this information during sales order entry, where you can select from previously ordered configured items to enter on the current sales order.
See Also

- Working with Configured Item Sales Orders (P4211)

To review configured string history

On Configured String History

1. Complete the following fields:
   - Branch Plant
   - Configured Item

2. Complete the following optional fields:
   - Order Type
   - Customer Number
   - Order Number

3. Access the detail area to display price and cost information in the following fields:
   - Order
   - Type
   - Price
   - Sold To
   - Cost
### Field Explanation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Number</td>
<td>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.</td>
</tr>
<tr>
<td>Order Number</td>
<td>The number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.</td>
</tr>
<tr>
<td>Order/Type</td>
<td>The number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.</td>
</tr>
<tr>
<td>Configured String</td>
<td>This field stores the configured string as it was input on the related sales order.</td>
</tr>
<tr>
<td>Req Dated</td>
<td>The date that an item is to arrive or that an action is to be complete.</td>
</tr>
</tbody>
</table>
Understand Configured Items and Manufacturing

About Configured Items and Manufacturing

After you have entered a configured item sales order, use programs in the Manufacturing system to monitor production of the configured item within the Shop Floor Control and Manufacturing system.

This includes the following:

- Reviewing Hours and Quantities
- Working With Manufacturing Accounting and Product Costing
- Working with Work Order Completions

Reviewing Hours and Quantities

From Shop Floor Control (G31), choose Daily Order Reporting
From Daily Order Reporting (G3112), choose Order Hours Status

As production continues on a configured item’s work order, you must record the hours spent on production and the number of items completed in that time. This allows you to monitor progress and costs and compare them against the standard hours and quantities that you estimated for the job.

After you enter hours and quantities, you can review and revise them before you post them to the Manufacturing system for further tracking and cost accounting.

You can review the quantities entered against the operations scheduled for a configured item’s work order, including the actual quantity ordered, completed, and scrapped for each operation. You can also view the standard and variance values, along with the status code, which can be updated for the operation.
Example: Reviewing Hours and Quantities

Processing Options

See Work Order Time Entry (P311221).
See Also

- Reviewing the Status of Hours (P311221) in the Shop Floor Control Guide
- Reviewing the Status of Quantities (P31226) in the Shop Floor Control Guide

Working With Manufacturing Accounting and Product Costing

Costing for configured items is different from costing for non-configured items. As you manufacture configured items, no engineering variance exists because there is no standard bill of material or routing for the configured item.

The Work Order Processing program calculates the configuration-specific costs. It calculates frozen standard costs for the configured item and updates the unit and extended costs for the sales order. These costs are the accumulation of the components’ standard costs, the labor and overhead values defined with manufacturing constants, and the attached routing, work center information, and work order values.

The system stores the configuration-specific standard costs in the Work Order Variance table (F3102) and uses these costs for related Manufacturing Accounting transactions. Configured items do not require rolled frozen standard costs in the Item Cost Component Add-Ons table (F30026). However, standard costs for purchased parts and manufactured parts used by configured items must be frozen (07 Cost Method in F4105) in order to be factored into F3102 standard costs for work orders.

**Note:** The Product Costing system does not support transfer orders for configured items.

See Also

- Understanding Kit Pricing in Configured Items
- About Costing Configured Items (P31410) in the Product Costing and Manufacturing Accounting Guide
Working with Work Order Completions

| From Shop Floor Control (G31), choose **Daily Order Reporting**<br>| From Daily Order Reporting (G3112), choose a Completions option |

The Work Order Completions program uses the information entered in the Shop Floor Control system to create general ledger journal entries. Shop Floor Control creates no interactive journal entries, all journal entries are processed in batch.

For configured items, the system populates new locations with standard costs from the Work Order Variance table so transactions in the Distribution system use the correct costs. The Work Order Completions program will hard commit the associated sales order and update the sales order’s lot and location information.

**See Also**

- Creating Journal Entries (P31802) in the Shop Floor Control Guide
Understand Configured Items and Distribution

About Configured Items and Distribution

After you have entered a sales order and generated work orders for a configured item, use the following programs in the Distribution system to complete the sales order processing cycle:

- Enter Sales Orders
- Print Pick Slips
- Shipment Confirmation
- Print Invoices
- Print Invoice Journal
- Print G/L Sales Recap
- Update A/R and G/L

This section contains the following:

- Working with Configured Item Inventory
- Checking Availability
- Working with Pick Lists
- Working with Shipments
- Working with Invoices

Working with Configured Item Inventory

The Configuration Management system enables you to stock configured items. For stocked configured items, you can use programs within the Distribution system to:

- Review configured strings.
- Review configuration-specific costing information.
- Check availability for configured end items. You can search for segments or for an exact configured string match.
- Select a stocked configured item during sales order entry. The system hard commits the item, does not generate a work order, and uses costs in the Item Cost Revision table.
Perform inventory transactions, such as:
- Simple issues
- Transfers
- Adjustments

The Inventory Management system does not support reclassifications of configured items.

**See Also**
- Issuing Inventory (P4112) in the Inventory Management Guide
- Transferring Inventory (P4113) in the Inventory Management Guide
- Adjusting Inventory (P4114) in the Inventory Management Guide

**Example: Issues**

From Inventory Management (G41), choose *Item Master/Transactions*
From Item Master/Transactions (G4111), choose *Issues*

You can perform simple issues on quantities of configured items from locations.
Example: Transfers

From Inventory Management (G41), choose **Item Master/Transactions**
From Item Master/Transactions (G4111), choose **Transfers**

You can transfer configured items from one location to another.
Example: Adjustments

From Inventory Management (G41), choose Item Master/Transactions
From Item Master/Transactions (G4111), choose Adjustments

You can adjust quantities for configured items in a specific location. Configuration Management supports adjustments for locations with existing inventory and adjustments from zero quantity as long as the configuration-specific string history has been defined in the system.
Checking Availability

Use new function keys and options from the Summary and Detailed Availability forms to review the configured item segments.

Checking Availability during Sales Order Entry

To check availability during sales order entry, you must set the Check Availability field to Y in Configurator Constants. During sales order entry, if the system finds the exact item and string match, all locations containing the specific configuration appear. You can review segment values for all levels of the configured item and select an item used on the sales order. However, no component availability checking is performed.

You can stock configured items and configured subassemblies for sales purposes. You can sell configured subassemblies, but you should not attempt an inventory issue on stocked configured items. Manufacturing Accounting does not support issuing the same stocked configured subassembly part which might have many different costs based on the configuration.

**Note:** The system does not perform automatic line splitting if the quantity ordered and the quantity selected is different.

See Also

- Working with Configured Item Sales Orders (P4211)
- Locating Summary Quantity Information (P41202) in the Sales Order Management Guide
- Locating Detailed Quantity Information (P41023) in the Sales Order Management Guide
- Reviewing Sales Orders (P42045) in the Sales Order Management Guide
Example: Summary Availability

From Item Master/Transactions (G4111), choose Inventory Inquiries
From Inventory Inquiries (G42112), choose Summary Availability

You can use Summary Availability to review inventory locations containing stock for a configured item. Review information such as on-hand, committed, and available quantities for each location.
Example: Detailed Availability

From Item Master/Transactions (G4111), choose Inventory Inquiries
From Inventory Inquiries (G42112), choose Detailed Availability

You can use Detailed Availability to review the status of configured items in a specific location. Review information such as on-hand quantity of a configured item and related commitments against that quantity.

Example: Reviewing Customer Service Information

From Sales Order Management (G42), choose Sales Order Inquiries
From Sales Order Inquiries (G42112), choose Customer Service

Review customer service information to:

- Locate current sales order information from the Sales Detail and the Sales Detail History File tables
- Provide information at the sales order, customer, and item levels
- Change associated text for the sales order line
- Display configuration-specific information
Working with Pick Lists

From Sales Order Inquiries (G42112), choose Sales Order Reports
From Sales Order Reports (G42111), choose Print Pick Slips

After you have generated sales and work orders for configured items, use the Print Pick Slip program to print pick lists. Pick lists include the following information:

- Order quantities picked and moved to the staging or shipping area of the warehouse
- Price by line item basis and for the order as a whole, useful for COD (cash on delivery) deliveries
- Driver’s signature line
- Customer signature line, useful for verifying delivery
Example: Pick Lists

<table>
<thead>
<tr>
<th>Description</th>
<th>Item Number/Location, Lot</th>
<th>Line</th>
<th>Shipped</th>
<th>Backorder</th>
<th>UM</th>
<th>Price</th>
<th>Extended Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forklift</td>
<td>FORKLIFT</td>
<td>1.00</td>
<td></td>
<td>1</td>
<td>EA</td>
<td>48,500.00</td>
<td>48,500.00</td>
</tr>
<tr>
<td>*Forklift Boom</td>
<td>BOOM</td>
<td>1.01</td>
<td>Related Order</td>
<td>13913 Per EA</td>
<td>0.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Forklift Fork</td>
<td>FORK</td>
<td>1.02</td>
<td>Related Order</td>
<td>13911 Per EA</td>
<td>0.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cross Member</td>
<td>R115</td>
<td>1.03</td>
<td>Related Order</td>
<td>13912 Per EA</td>
<td>0.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard Blade</td>
<td>R100</td>
<td>1.04</td>
<td>2</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>Chain</td>
<td>R125</td>
<td>1.05</td>
<td>1</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>Standard Pump</td>
<td>B100</td>
<td>1.06</td>
<td>1</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>Counterweights</td>
<td>F165</td>
<td>1.07</td>
<td>17</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>2000 lb. Chassis</td>
<td>F105</td>
<td>1.08</td>
<td>1</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>Battery Drive Unit</td>
<td>F130</td>
<td>1.09</td>
<td>1</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>Hard Rubber Tire</td>
<td>F175</td>
<td>1.10</td>
<td>4</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>Yellow Paint</td>
<td>F150</td>
<td>1.11</td>
<td>1</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>8 Ft Boom</td>
<td>F135</td>
<td>1.12</td>
<td>1</td>
<td></td>
<td>EA</td>
<td>0.0000</td>
<td></td>
</tr>
<tr>
<td>Freight Charge</td>
<td></td>
<td>1.13</td>
<td>1</td>
<td></td>
<td>EA</td>
<td>500.0000</td>
<td>500.00</td>
</tr>
<tr>
<td>Dealer Prep</td>
<td></td>
<td>1.14</td>
<td>1</td>
<td></td>
<td>EA</td>
<td>200.0000</td>
<td>200.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.15</td>
<td>1</td>
<td></td>
<td>EA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Driver Signature: Customer Signature: Shippable Weight: **Final**: Sales Tax: Total Order: 49,200.00

See Also

- Working With Picking Documents (P42520) in the Sales Order Management Guide

Working with Shipments

The Configuration Management system supports shipments of configured items. However, the system does not allow you to backorder a configured item.

Use the Confirm Shipments program to:

- Locate existing order information
- Add additional line items (non-inventory items only)
- Change the shipped, backorder, and cancel quantities
- Specify a container ID, carrier code, and/or shipment date for each line item
- Override the Ship To Address
- Ship from other or multiple locations
- Adjust inventory (on-hand or hard commits)
- Confirm shipment
- Record serial numbers for shipped items
- Review the Freight/Additional Charges Revisions program

See Also

- Working With Shipments (P4205) in the Sales Order Management Guide

Working with Invoices

From Sales Order Management (G42), choose Sales Order Reports
From Sales Order Reports (G42111), choose Print Invoices

From the Sales Order Reports menu (G42111), choose Print Invoices.
Use the Print Invoices program to print sales order invoices. You can print invoices in proof mode, review them, and then print the invoices and update the files. You can also print invoices in draft mode to review the invoice before updating it. In addition, you can print an invoice from history.
Example: Invoice

<table>
<thead>
<tr>
<th>JD Edwards World</th>
<th>Page Number-</th>
<th>1</th>
</tr>
</thead>
</table>

- **Date**: 06/25/17
- **Customer**: 1001
- **Brn/Plt**: M30
- **Related PO**: 145971
- **Order Nbr**: 9565 80
- **Invoice**: -

<table>
<thead>
<tr>
<th><strong>Sold To</strong>: JD Edwards World</th>
<th><strong>Ship To</strong>: JD Edwards World</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ms. Donna Flirkpatick</td>
<td>8055 E. Tufts Ave.</td>
</tr>
<tr>
<td>Vice-President/CFO</td>
<td>Suite 1300</td>
</tr>
<tr>
<td>8055 E. Tufts Ave.</td>
<td>Denver CO 80237</td>
</tr>
<tr>
<td>Suite 1300</td>
<td></td>
</tr>
<tr>
<td>Denver CO 80237</td>
<td></td>
</tr>
</tbody>
</table>

**Tax ID**: 45-502499
**Tax Cert**: -
**Request Date**: 06/25/17
**Customer P.O.**: -
**F.B.**: -
**Ship**: -
**Inst**: -

<table>
<thead>
<tr>
<th>Ln/Rq Dt</th>
<th>Description</th>
<th>Item Number</th>
<th>UN Ship/Back/Cance</th>
<th>Price</th>
<th>Extended Price</th>
<th>Tax</th>
<th>Extended Cost</th>
<th>Pct</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/25/17</td>
<td>Forklift, New Improved</td>
<td>FORKLIFT-A</td>
<td>EA S</td>
<td>1</td>
<td>48,500.0000</td>
<td>48,500.00</td>
<td>Y</td>
<td>38,147.95</td>
</tr>
</tbody>
</table>

**Terms**: Net 30 Days
**Net Due Date**: 07/25/17
**Tax Rt**: 3.800
**Per EA Sales Tax**: 1,843.00
**Total Order**: 50,343.00
See Also

- Working With Invoices (P42565) in the Sales Order Management Guide
Understand Kit Pricing in Configured Items

Understanding Kit Pricing in Configured Items

A kit is a collection of inventory items, called components, that are associated with a parent item. Components are stocked inventory items that are sold collectively in the parent item.

Unlike configured items, kits:

- Have a single-level product structure
- Identified by a single item number
- Are parent only; no child work orders
- Defined by bill of materials
- Use basic routing

Despite these differences, you can use kit pricing methods with configured items. There are four kit pricing methods to calculate pricing for configured items:

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Method 1</td>
<td>The system totals the list prices of the components (F4106) to arrive at the Configured Item price. Add all of the component prices to arrive at the Configured Item price. The price of the Configured Item can then be discounted. The system will also check the Assembly Inclusion Rules for any X-Rules. The X-Rules will be added to the price of the Configured Item. These X-Rules could be used for price add-ons such as shipping / freight charges</td>
</tr>
<tr>
<td>Method 2</td>
<td>The system looks for a price for the Configured Item in the pricing (F4106) file. This will be the sales order price of the Configured Item. This price can be discounted. The system will also check the Assembly Inclusion Rules for any X-Rules. The X-Rules will be added to the price of the Configured Item. These X-Rules could be used for price add-ons such as shipping / freight charges.</td>
</tr>
<tr>
<td>Method 3</td>
<td>The Assembly Inclusion X-Rules will be the only source of pricing. The base price can be pulled into the configuration by using the &quot;derived calculation&quot; field of the Assembly Inclusion Rule. The &quot;derived calculation&quot; field should be populated with &amp;BPUPRC to pull in the base price from the pricing file (F4106). Any other X-Rules will be added to the price of the configured item. These X-Rules could be used for price add-ons such as shipping / freight charges.</td>
</tr>
<tr>
<td>Method</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Method 4</td>
<td>The system will use the sum of the components discounted price for the Configured Item price. The Configured Item will get no further discounts. The system will also check the Assembly Inclusion Rules for any X-Rules. The X-Rules will be added to the price of the Configured Item. These X-Rules could be used for price add-ons such as shipping / freight charges. <strong>Note:</strong> If the F4106 pricing file is used for Configured Item pricing, and the X-rules contain &amp;BPRPRC to pull the base price, the price will appear doubled on the sales order. If the F4106 is used to pull the base price, the X-rules should be used only for other price adjustments such as freight charges.</td>
</tr>
</tbody>
</table>
5 Processing Options
# Setup Processing Options

## Branch/Plant Item Information (P41026)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PROCESS CONTROL:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Enter a '1' to select the Item Location information screens to automatically call when performing an add or a change. If left blank, screen will not display. Classification Codes Cost Revisions (conditional) Price Revisions (conditional) Unit of Measure Quantities Manufacturing Values Item Profile Bulk Product Information Lot Processing</td>
<td></td>
</tr>
<tr>
<td>2. Enter '1' to use the window version of the screens selected above. If left blank, the full screens will display.</td>
<td></td>
</tr>
<tr>
<td><strong>DREAM WRITER VERSIONS:</strong></td>
<td></td>
</tr>
<tr>
<td>3. Summary Availability (P41202)</td>
<td></td>
</tr>
<tr>
<td>4. Item / Location Information (P41024)</td>
<td></td>
</tr>
<tr>
<td>5. Product Catalog Detail Information (P41903)</td>
<td></td>
</tr>
<tr>
<td><strong>REVISION LEVEL CONTROL:</strong></td>
<td></td>
</tr>
<tr>
<td>6. Enter '1' to protect ECO revision information from update.</td>
<td></td>
</tr>
</tbody>
</table>
### Manufacturing Data (P41027)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVISION LEVEL CONTROL:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Enter '1' to protect ECO revision information from update.</td>
<td></td>
</tr>
</tbody>
</table>

### Routing Master Revisions (P3003)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FIELD DISPLAY:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Enter a '1' by the following fields to activate them:</td>
<td></td>
</tr>
<tr>
<td>Line/Cell</td>
<td></td>
</tr>
<tr>
<td>Routing Type</td>
<td></td>
</tr>
<tr>
<td>Batch Quantity</td>
<td></td>
</tr>
<tr>
<td><strong>DEFAULT VALUES:</strong></td>
<td></td>
</tr>
<tr>
<td>2. Routing Type (Optional)</td>
<td></td>
</tr>
<tr>
<td><strong>UPDATE OPTIONS:</strong></td>
<td></td>
</tr>
<tr>
<td>3. Enter a '1' to update the Component Operation Scrap Percent in the Bill of Material for the components on the operation and the Cumulative Yield Percent on the Routing, when updating the operation yield percent.</td>
<td></td>
</tr>
<tr>
<td><strong>COMPONENT BRANCH:</strong></td>
<td></td>
</tr>
<tr>
<td>4. Enter a '1' to change Component Branch to that of Parent Branch when copying a routing.</td>
<td></td>
</tr>
<tr>
<td><strong>DATE EFFECTIVITY:</strong></td>
<td></td>
</tr>
<tr>
<td>5. Enter a date to default into the As of Date or '*' to display all dates.</td>
<td></td>
</tr>
<tr>
<td>If left blank, the system date will be used.</td>
<td></td>
</tr>
</tbody>
</table>
## Customer/Item/Order Detail Group (P4092)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PROCESSING CONTROL:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Enter the format to be displayed:</td>
<td></td>
</tr>
<tr>
<td>'1' Item Group Definition</td>
<td></td>
</tr>
<tr>
<td>'2' Customer Group Definition</td>
<td></td>
</tr>
<tr>
<td>'3' Order Detail Group Definition (This group definition is used within advanced price adjustments.)</td>
<td></td>
</tr>
<tr>
<td>If left blank a '1' will be used.</td>
<td></td>
</tr>
</tbody>
</table>

## Assembly Inclusion Rules (P3293)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DEFAULT VALUES:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Enter the default Rule Type.</td>
<td></td>
</tr>
<tr>
<td><strong>COMPONENT BRANCH:</strong></td>
<td></td>
</tr>
<tr>
<td>2. Enter a '1' to change the Component Branch (Additions Only) to that which is displayed at the top of the screen.</td>
<td></td>
</tr>
<tr>
<td><strong>SCREEN DEFAULTS:</strong></td>
<td></td>
</tr>
<tr>
<td>3. Enter a '1' to default the as of date to the current date.</td>
<td></td>
</tr>
<tr>
<td>If left blank, all dates will be shown.</td>
<td></td>
</tr>
</tbody>
</table>

## Rule Table Definition (P3281)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Rule Table Type (Optional)</td>
<td></td>
</tr>
</tbody>
</table>
# Configured Item Cross-Reference (P3282)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DEFAULT VALUES:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Rule Table Type (Optional)</td>
<td></td>
</tr>
</tbody>
</table>

# Table Detail (P3283)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DEFAULT VALUES:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Rule Table Type (Optional)</td>
<td></td>
</tr>
</tbody>
</table>

# Rules Table Print (P3283P)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PRINT FORMAT:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Enter ‘1’ to print the Quantity and Unit of Measure under the Item Number on Parts Rule Tables. If left blank, only the Item Number will be printed.</td>
<td></td>
</tr>
</tbody>
</table>
Sales Orders Processing Options

### Sales Order Entry (P4211)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SALES ORDER DEFAULT VALUES:</strong></td>
<td>Enter the document type relevant to this particular version of Sales Order Entry. You will likely have multiple versions of P4211 to accommodate each of the different document types you use, for example, sales orders, blanket orders, quote orders, ECS orders, and so on.</td>
</tr>
<tr>
<td>1. Document Type (Required)</td>
<td></td>
</tr>
<tr>
<td>2. Line Type (Optional)</td>
<td>Enter the line type to default to all order lines; otherwise, the system retrieves the line type from Item Branch Information (P41026) or Item Master Information (P4101) set up for the item number. You can also manually enter a line type.</td>
</tr>
<tr>
<td>3. Beginning Status (Optional)</td>
<td></td>
</tr>
<tr>
<td>4. Override Next Status (Optional)</td>
<td></td>
</tr>
<tr>
<td>5. Unit of Measure (Optional)</td>
<td></td>
</tr>
<tr>
<td>6. Line Number Increment (Optional)</td>
<td></td>
</tr>
<tr>
<td>7. Reason Code (Optional)</td>
<td></td>
</tr>
<tr>
<td><strong>UNIT OF MEASURE DEFAULT VALUES:</strong></td>
<td>Enter '1' to use the Pricing UOM as the default Transaction UOM. If left blank, the Primary UOM will be used instead.</td>
</tr>
<tr>
<td>8. Enter '1' to use the Pricing UOM as the default Transaction UOM. If left blank, the Primary UOM will be used instead.</td>
<td></td>
</tr>
<tr>
<td><strong>WORK ORDER DREAM WRITER VERSIONS:</strong></td>
<td>Enter the version for each program. If left blank, ZJDE0001 will be used:</td>
</tr>
<tr>
<td>9. Work Order Entry (P48013)</td>
<td></td>
</tr>
<tr>
<td>10. WO Server for Sale Order (X4201WO)</td>
<td></td>
</tr>
</tbody>
</table>
## Sales Orders Processing Options

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ORDER DUPLICATION DEFAULT VALUES:</strong></td>
<td></td>
</tr>
<tr>
<td>11. Document Type</td>
<td>Enter the document type for new orders you create when you press F21 to copy an existing order.</td>
</tr>
<tr>
<td>12. Beginning Status</td>
<td>Enter the Last Status for new orders you create when you press F21 to copy an existing order.</td>
</tr>
<tr>
<td>13. Enter text duplication selection</td>
<td>'1' to copy line text</td>
</tr>
<tr>
<td></td>
<td>'2' to copy line and order text</td>
</tr>
<tr>
<td></td>
<td>'3' to copy order text</td>
</tr>
<tr>
<td><strong>ADDRESS BOOK DEFAULT VALUES:</strong></td>
<td></td>
</tr>
<tr>
<td>14. Address Book default branch.</td>
<td>'1' - Ship To Address</td>
</tr>
<tr>
<td></td>
<td>'2' - Sold To Address</td>
</tr>
<tr>
<td></td>
<td>' ' - User default location</td>
</tr>
<tr>
<td><strong>DOWNLOAD HEADER INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>15. Enter '1' to automatically load header values to the detail lines after a change.</td>
<td>If left blank, it must be done manually.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PROMPTING CONTROL:</strong></td>
<td></td>
</tr>
<tr>
<td>16. Enter the Screen Format:</td>
<td>1 = Quantity, Item, Price</td>
</tr>
<tr>
<td></td>
<td>2 = Quantity, Item, Description</td>
</tr>
<tr>
<td></td>
<td>3 = Item, Quantity, Price</td>
</tr>
<tr>
<td></td>
<td>4 = ECS format</td>
</tr>
<tr>
<td></td>
<td>5 = Aggregates format (If left blank, format 1 is used.)</td>
</tr>
<tr>
<td></td>
<td>Enter a '1' to:</td>
</tr>
<tr>
<td>17. Display Headings first.</td>
<td>Set this to blank if you enter configured items. Two-cycle order entry is not valid for configured items as the configuration is recorded on the first cycle.</td>
</tr>
<tr>
<td>18. Be prompted to accept the order.</td>
<td><strong>Note:</strong> Two-cycle order entry is not recommended for configured items.</td>
</tr>
<tr>
<td>19. Allow the addition of a Customer Master record, if not set up.</td>
<td>Set this to 1 to have the Customer Master screen (P01053) automatically appear when you enter a sold-to or ship-to address for which master information does not currently exist. If you don’t set this option to 1, you can add an order without Customer Master information. However, the system will error on the order at Sales Update (P42800).</td>
</tr>
<tr>
<td>Processing Option</td>
<td>Processing Options Requiring Further Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>20. Load Online Invoice information before the order is accepted.</td>
<td></td>
</tr>
<tr>
<td>21. Enter which Item Search screen is to be used to return items:</td>
<td>The option you choose determines the item search screen that displays when you press F1 on the Item Number field in the detail screen. A blank in this option prompts the P40ITM1 window. Option 1 prompts the P40ITM2 window, and option 2 prompts the P41200 screen.</td>
</tr>
<tr>
<td>1 = Item Search window allowing the return of multiple items</td>
<td></td>
</tr>
<tr>
<td>2 = Full Item Search screen with Query capabilities</td>
<td>(If left blank, the Item Search window allowing the return of a single item will be used.)</td>
</tr>
<tr>
<td>ORDER HOLD CODES:</td>
<td></td>
</tr>
<tr>
<td>22. Customer Credit Checking</td>
<td></td>
</tr>
<tr>
<td>23. Order Margin Checking</td>
<td></td>
</tr>
<tr>
<td>24. Order Line Margin Checking</td>
<td></td>
</tr>
<tr>
<td>25. Order Minimum Value Checking</td>
<td></td>
</tr>
<tr>
<td>26. Order Maximum Value Checking</td>
<td></td>
</tr>
<tr>
<td>27. Partial Order Hold</td>
<td></td>
</tr>
<tr>
<td>28. Product Allocation Hold</td>
<td></td>
</tr>
<tr>
<td>LINE CONTROL STATUS:</td>
<td></td>
</tr>
<tr>
<td>29. Enter the next status code beyond which a detail line cannot be changed.</td>
<td></td>
</tr>
<tr>
<td>If left blank, no restriction will be put on the changing of a line.</td>
<td></td>
</tr>
<tr>
<td>FIELD DISPLAY CONTROL:</td>
<td>Set this to 1 to protect the following fields: Branch, Adjustment Schedule, Trade Discount, Payment Terms, Payment Instructions, and Item Price Group. The value also protects freight charge related fields including Shipping Commodity Code, Shipping Condition, Rate Code, Route, Stop and Zone.</td>
</tr>
<tr>
<td>Enter '1' to protect or '2' to suppress</td>
<td></td>
</tr>
<tr>
<td>30. Cost Fields</td>
<td></td>
</tr>
<tr>
<td>31. Price Fields</td>
<td></td>
</tr>
<tr>
<td>Enter '1' to protect the following:</td>
<td></td>
</tr>
<tr>
<td>32. Status Codes</td>
<td></td>
</tr>
<tr>
<td>33. Price adjustment driver fields</td>
<td></td>
</tr>
<tr>
<td>Processing Option</td>
<td>Processing Options Requiring Further Description</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>34. Sold To field on the header</td>
<td>Enter a '1' to suppress the following:</td>
</tr>
<tr>
<td>35. Closed Detail Lines</td>
<td></td>
</tr>
<tr>
<td>36. Credit Card Information</td>
<td></td>
</tr>
<tr>
<td>37. Freight and Carrier Information</td>
<td></td>
</tr>
<tr>
<td>38. Commission Information</td>
<td></td>
</tr>
<tr>
<td><strong>CREDIT ORDER PROCESSING:</strong></td>
<td></td>
</tr>
<tr>
<td>39. Enter the status code to select when retrieving credit orders.</td>
<td>This option is relevant to the Credit Orders from History program (P42045).</td>
</tr>
<tr>
<td>40. Enter '1' if the previous status is the last status.</td>
<td>This option is relevant to the Credit Orders from History program (P42045).</td>
</tr>
<tr>
<td>If left blank it will be the Next Status.</td>
<td></td>
</tr>
<tr>
<td><strong>CROSS REFERENCE INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>41. Enter the Cross Reference Type for:</td>
<td></td>
</tr>
<tr>
<td>- Substitute Items</td>
<td></td>
</tr>
<tr>
<td>- Associated Items</td>
<td></td>
</tr>
<tr>
<td>- Replacement Items</td>
<td></td>
</tr>
<tr>
<td>42. Enter '1' to use the substitute item's Unit Price.</td>
<td>If left blank, the original item's price will be used to order the substitutes.</td>
</tr>
<tr>
<td>If left blank, the original item's price will be used to order the substitutes.</td>
<td></td>
</tr>
<tr>
<td><strong>KIT PROCESSING:</strong></td>
<td></td>
</tr>
<tr>
<td>43. Enter '1' to suppress Kit Component lines.</td>
<td></td>
</tr>
<tr>
<td>44. Enter the version of Kit Inquiry to call.</td>
<td>If left blank, version ZJDE0001 will be called.</td>
</tr>
<tr>
<td>If left blank, version ZJDE0001 will be called.</td>
<td></td>
</tr>
<tr>
<td>45. Enter '1' to suppress availability information in the Kit Window.</td>
<td></td>
</tr>
</tbody>
</table>
## Processing Options

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AVAILABILITY CHECKING:</strong></td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>46. Enter '1' to be notified of an automatic backorder or cancel.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>Enter '2' to be notified but not create the backorder or cancel.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>Enter '3' to create the backorder or cancel automatically and update the order without issuing the warning.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>If left blank, no availability checking will be done.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td><strong>COMMITMENT CONTROL:</strong></td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>47. Enter '1' for commitment to Other Quantity 1.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>Enter '2' for commitment to Other Quantity 2.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>This option is typically used in conjunction with a Blanket or Quote Order. If this option is used, the commitment preference will be ignored.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>This option applies to stock items only. You set the option to 1 or 2 if you do not want the items you enter on the order to affect availability. For example, you usually do not want items on blanket orders or quote orders to affect availability.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>If you leave this option blank, all stock items you enter on the order will accumulate to either the soft, hard, or future commitment buckets in the Item Balance file (F41021). If you set the option to 1 or 2, quantities accumulate to the SO Quantity 1 or SO Quantity 2 buckets. You can view cumulative quantities for an item in Detailed Availability (P41023).</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>When you set this option to 1 or 2, the system also updates the Other Quantity 1 or 2 fields (SDOTQY) in the Sales Order Detail file (F4211). It also prevents the system from updating the Open Order Amount (SHOTOT) in the Sales Order Header file (F4201).</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>If you release items from blanket or quote orders using the Release Orders program (P420111), the program assumes released orders were initially recorded to the other quantity 1 or 2 buckets.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td><strong>AUTOMATIC PROCESSING:</strong></td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>48. Enter '1' to automatically display the Supply and Demand screen when a new sales detail line is backordered.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>49. Enter '1' to print pick slips or a '2' to print invoices through the subsystem.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>Enter '3' for on-line commitment or a '4' for subsystem commitment.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td><strong>Note:</strong> If ECS is on, '1' will print order-based packed loading notes through a subsystem.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>50. Enter '1' for auto order repricing.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>Set this option to 3 to have the system automatically hard commit orders, in which case P4211 calls the Batch Commitment program (P42997) to perform the hard commitment.</td>
<td><img src="#" alt="Table" /></td>
</tr>
<tr>
<td>Processing Option</td>
<td>Processing Options Requiring Further Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td><strong>DREAM WRITER VERSIONS:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the version for each program.</td>
<td></td>
</tr>
<tr>
<td>If left blank, ZJDE0001 will be used:</td>
<td></td>
</tr>
<tr>
<td>51. Pick Slip Print (P42520)</td>
<td></td>
</tr>
<tr>
<td>52. Supply and Demand (P4021)</td>
<td></td>
</tr>
<tr>
<td>53. Std Order/ Basket Reprice (P421301) or Adv Order/ Basket Reprice (P42750)</td>
<td></td>
</tr>
<tr>
<td>55. Online Invoice (P42230)</td>
<td></td>
</tr>
<tr>
<td>56. Preference Profile (P40400)</td>
<td></td>
</tr>
<tr>
<td>57. Check Price (Advanced) (P40721)</td>
<td></td>
</tr>
<tr>
<td>58. Customer Master (P01053)</td>
<td></td>
</tr>
<tr>
<td>59. TM Rate &amp; Route server PSMR9100</td>
<td></td>
</tr>
<tr>
<td><strong>CONFIGURATOR PROCESSING:</strong></td>
<td></td>
</tr>
<tr>
<td>60. Enter one of the following for the mode of Specification Entry.</td>
<td></td>
</tr>
<tr>
<td>If left blank, '2' will be used:</td>
<td></td>
</tr>
<tr>
<td>'1' = Text Mode</td>
<td></td>
</tr>
<tr>
<td>'2' = Assisted Mode</td>
<td></td>
</tr>
<tr>
<td>'3' = Assisted Prompt Mode</td>
<td></td>
</tr>
<tr>
<td><strong>TRANSFER PRICE UPDATE:</strong></td>
<td></td>
</tr>
<tr>
<td>61. Enter the order type(s) that the system will use to invoke inter-branch updates.</td>
<td></td>
</tr>
<tr>
<td>To specify more than one order type, type them one after the other along this field.</td>
<td></td>
</tr>
<tr>
<td>62. Enter the transfer pricing method to be used.</td>
<td></td>
</tr>
<tr>
<td>Default method is 1.</td>
<td></td>
</tr>
<tr>
<td>1 = Branch cost mark-up</td>
<td></td>
</tr>
<tr>
<td>2 = Transfer pricing</td>
<td></td>
</tr>
<tr>
<td>63. Enter '1' to allow inter-branch invoicing.</td>
<td></td>
</tr>
<tr>
<td>If left blank, no inter-branch invoice can be run.</td>
<td></td>
</tr>
<tr>
<td><strong>WAREHOUSE PROCESSING:</strong></td>
<td></td>
</tr>
<tr>
<td>Processing Option</td>
<td>Processing Options Requiring Further Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------</td>
</tr>
</tbody>
</table>
| 64. Enter the request processing mode:  
   ' ' = No pick requests  
   '1' = Generate requests only  
   '2' = Generate requests and process using the subsystem | |
| 65. If processing pick requests using the subsystem, enter the DREAM Writer version to use.  
   If blank, XJDE0002 is used.  
   (See Form ID P46171.) | |
| 66. Enter an override next status for sales order lines for which requests have been generated. | |

**ORDER TEMPLATE PROCESSING:**

| 67. Enter a '1' to use the Sold-to address number for order template.  
   Enter a '2' to use the Ship-to address number.  
   If left blank, no automatic order template processing will be performed. | |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>68. Enter the order template name.</td>
<td></td>
</tr>
</tbody>
</table>

**BLANKET/QUOTE PROCESSING:**

| 69. Enter '1' for automatic access to the blanket/quote release processing by Sold To address.  
   Enter '2' for automatic access to the blanket/quote release processing by Ship To address.  
   If left blank, no automatic access to the blanket/quote release processing will be performed. | |

**PREFERENCE PROFILE PROCESSING:**

| 70. Enter a '1' to use preference profile defaults.  
   If left blank, no preference profile information will be defaulted. | If you enter 1 in this field, you must also set up a corresponding version of the Preference Processing program (P40400) and attach it to processing option 56. |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>71. Enter a '1' to use the Inventory Commitment Preference to source from multiple branches or to view grade or potent items in the commitment window.</td>
<td></td>
</tr>
</tbody>
</table>

**CURRENCY PROCESSING:**


<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>72. Enter the tolerance limit percentage to warn you of currency rate changes.</td>
<td>A 15.0 indicates a warning if the rate is 15 percent greater or less than the current rate.</td>
</tr>
<tr>
<td>LOAD CONFIRM PROCESSING: (ECS):</td>
<td></td>
</tr>
<tr>
<td>73. Enter '1' to automatically branch to load confirm when order are added.</td>
<td></td>
</tr>
<tr>
<td>74. Enter the version of Bulk Load Confirm (P49510) to be used.</td>
<td></td>
</tr>
<tr>
<td>75. Enter the version of Packaged Load Confirm (P49530) to be used.</td>
<td></td>
</tr>
<tr>
<td>AVIATION/MARINE PROCESSING: (ECS):</td>
<td></td>
</tr>
<tr>
<td>76. Enter the version of the Additional Parameters program (P49510A) to be used.</td>
<td></td>
</tr>
<tr>
<td>TRIP ASSIGNMENT WINDOW: (ECS):</td>
<td></td>
</tr>
<tr>
<td>77. Enter the version of the Trip Assignment window (P49200) to be used.</td>
<td></td>
</tr>
<tr>
<td>MARK-FOR ADDRESS PROCESSING:</td>
<td></td>
</tr>
<tr>
<td>78. Enter '1' to display Mark-for Address.</td>
<td></td>
</tr>
<tr>
<td>ADVANCED LOT MANAGEMENT:</td>
<td></td>
</tr>
<tr>
<td>79. Enter '1' to issue an error when the Ship Ascending Date Rule is violated.</td>
<td>If left blank, only a warning will be issued.</td>
</tr>
<tr>
<td>80. Enter '1' to issue a warning when an immature lot (one not yet in effect) is</td>
<td>If left blank, an error will be issued and immature lots will not be counted as available.</td>
</tr>
<tr>
<td>entered and to include immature lots in the calculation of availability.</td>
<td></td>
</tr>
<tr>
<td>SERVICE WARRANTY MANAGEMENT:</td>
<td></td>
</tr>
<tr>
<td>81. Enter '1' to submit a batch job upon exiting Sales Order Entry to automatically assign service warranties to sales order detail lines.</td>
<td></td>
</tr>
<tr>
<td>Processing Option</td>
<td>Processing Options Requiring Further Description</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>82. Enter the DREAM Writer version for Batch Assign Service Warranty (P42404).</td>
<td></td>
</tr>
<tr>
<td>If left blank, XJDE0001 is used.</td>
<td></td>
</tr>
</tbody>
</table>
# Configured Items Processing Options

## Generate and Print Configured Work Orders (Subsystem) (P31410)

<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GENERATION INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>1A. Enter one of the following:</td>
<td><strong>Note:</strong> If using Backflush to Work Center location in Manufacturing Constants, then routings must be attached first for commitments to be made correctly.</td>
</tr>
<tr>
<td>1 = Parts List only</td>
<td></td>
</tr>
<tr>
<td>2 = Routing only</td>
<td></td>
</tr>
<tr>
<td>3 = Both Parts List and Routing</td>
<td></td>
</tr>
<tr>
<td>If left blank, neither parts list nor routing will be generated.</td>
<td></td>
</tr>
<tr>
<td>1B. Enter a '1' to prevent the update of existing parts list and routing instructions. Commitment and substitute processing of parts lists will occur as usual.</td>
<td><strong>Note:</strong> If transactions have occurred against the order the parts list and routing should be protected from update.</td>
</tr>
<tr>
<td>If left blank, existing parts list and/or routing will be rewritten.</td>
<td></td>
</tr>
<tr>
<td>2. Enter a '1' to use the W.O. Date for effectivity checking. If left blank, the W.O. Start Date is used.</td>
<td></td>
</tr>
<tr>
<td><strong>UPDATE INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>3. Enter the new Status Code for the work order/rate header. If left blank, status will not be changed.</td>
<td></td>
</tr>
<tr>
<td><strong>WORK ORDER PRINT INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>4. Enter a '1' to print work orders. If printing work orders:</td>
<td></td>
</tr>
<tr>
<td><strong>PARTS LIST PRINT INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>5. Enter a '1' to print Parts List</td>
<td></td>
</tr>
<tr>
<td>Processing Option</td>
<td>Processing Options Requiring Further Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>6. Enter a '1' to print the 2nd line of information, which is scrap and related work center.</td>
<td></td>
</tr>
<tr>
<td>7. Enter a '1' to print Parts List on a new page.</td>
<td></td>
</tr>
<tr>
<td>8. Enter the version of the Parts List program (P31415). If left blank, 'ZJDE0001' will be used.</td>
<td></td>
</tr>
<tr>
<td>9. Enter a '1' to print a consolidated Parts List.</td>
<td></td>
</tr>
<tr>
<td><strong>ROUTING PRINT INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>10. Enter a '1' to print the Routing.</td>
<td></td>
</tr>
<tr>
<td>11. Enter a '1' to print Routing on a new page.</td>
<td></td>
</tr>
<tr>
<td>12. Enter the version of the Routing Instructions program (P314151). If left blank, the operation sequence is used.</td>
<td></td>
</tr>
<tr>
<td><strong>BACKSCHEDULING INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>13. Enter the Unit of Measure for backscheduling.</td>
<td></td>
</tr>
<tr>
<td><strong>Note:</strong> Hours is the standard unit of measure for backscheduling. If this option is left blank backscheduling will not calculate correctly.</td>
<td></td>
</tr>
<tr>
<td><strong>SHOP PACKET SUMMARY INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>14a. Enter a '1' to print the Shop Packet Summary.</td>
<td></td>
</tr>
<tr>
<td>14b. Enter the version of the Shop Packet Summary program (P31416). If left blank, 'ZJDE0001' will be used.</td>
<td></td>
</tr>
<tr>
<td><strong>SHORTAGE REPORT INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>15. Enter the version of the Shortage Report program (P31418). If left blank, no shortage report will be printed.</td>
<td></td>
</tr>
<tr>
<td><strong>BAR CODE INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>16. Enter the version of the Bar Code Print program (P31413) for the desired print overrides.</td>
<td></td>
</tr>
<tr>
<td><strong>INVENTORY ISSUE INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>Processing Option</td>
<td>Processing Options Requiring Further Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>17. Enter the version of Batch Inventory Issues program (P31420). If left blank, Inventory Issues will not be called.</td>
<td></td>
</tr>
<tr>
<td><strong>PURCHASE ORDER INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>18. Enter the version of Write Purchase Orders program (P3420). If left blank, 'ZJDE0002' will be used.</td>
<td></td>
</tr>
<tr>
<td><strong>SALES ORDER INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>19. Enter the new Line Type for kit and configured components. This is used to avoid issuing inventory from Sales Order processing. The Line Type used should be inventory interface 'N'. If left blank, Line Type will not be changed.</td>
<td></td>
</tr>
<tr>
<td>20. Enter the Next Status for Sales Order kit and configured component lines. (This is used to bypass the normal flow of the order, i.e., Pick Slip.) If left blank, next status will not be changed.</td>
<td></td>
</tr>
<tr>
<td>21. Enter a '1' to delete the existing Work Order Text and copy the Sales Order Text to the Work Order. Enter a '2' to append the Sales Order Text to the end of the existing Work Order Text. If left blank (default) the Work Order Text will not be updated.</td>
<td></td>
</tr>
<tr>
<td><strong>CONFIGURED ITEM COSTS:</strong></td>
<td></td>
</tr>
<tr>
<td>22. Enter one of the following options for calculating the standard cost for configured items in the Work Order Variance file (F3102). 1 = Always calculate the standard cost 2 = Only calculate the standard cost if it has not already done (no variance records exist) If left blank, standard cost will not be calculated.</td>
<td></td>
</tr>
<tr>
<td><strong>BOM SUBSTITUTES:</strong></td>
<td></td>
</tr>
<tr>
<td>Processing Option</td>
<td>Processing Options Requiring Further Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>23. Enter '1' to allow the use of Bill of Material substitutes in case of a shortage.</td>
<td></td>
</tr>
<tr>
<td><strong>PURCHASING JOURNAL ENTRIES:</strong></td>
<td></td>
</tr>
<tr>
<td>24. Enter a '1' to load the Work Order Number into the Subledger field of the purchasing J/E's.</td>
<td></td>
</tr>
<tr>
<td><strong>BLANKET/QUOTE PROCESSING:</strong></td>
<td></td>
</tr>
<tr>
<td>25. Enter a '1' for automatic blanket order release processing.</td>
<td></td>
</tr>
<tr>
<td><strong>BUILD AGAINST PRIOR REVISIONS:</strong></td>
<td></td>
</tr>
<tr>
<td>26. Enter a '1' to permit building work orders against prior revision levels. The revision level in the work order header (F4801) will be used to select the parts list to attach to the work order. If left blank, prior revision level bills will not be selected.</td>
<td></td>
</tr>
<tr>
<td><strong>WAREHOUSE PROCESSING:</strong></td>
<td></td>
</tr>
</tbody>
</table>
| 27. Enter the request processing mode:  
  1 = Generate requests only  
  2 = Generate requests and process using the subsystem.  
  If left blank, requests will not be generated. | |
| 28. If processing pick requests using the subsystem, enter the version of Process Pick Requests (P46171) to call.  
  If left blank, 'XJDE0002' will be used. | |
| 29. Enter the default staging location for moving goods out of the warehouse. | |
| 30. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated.  
  **Note:** This option only applies to parts with no work center locations. | |
<p>| <strong>GENERIC TEXT PRINT OPTIONS:</strong> | |
| 31. Enter a '1' to print the component's generic text on the Parts List. | |
| 32. Enter a '1' to print the operation's generic text on the Routing. | |</p>
<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BAR CODE INFORMATION:</strong></td>
<td></td>
</tr>
<tr>
<td>34. Enter the format for bar code printing.</td>
<td></td>
</tr>
<tr>
<td>1 = Code 3 of 9 (Code 39)</td>
<td></td>
</tr>
<tr>
<td>2 = Code 128</td>
<td></td>
</tr>
<tr>
<td>If left blank, bar codes will not print.</td>
<td></td>
</tr>
<tr>
<td><strong>COMMITMENT PROCESSING:</strong></td>
<td></td>
</tr>
<tr>
<td>35. Enter a '1' to bypass commitment processing when creating the Parts List.</td>
<td>If left blank, commitments will be processed per Commitment Control in Manufacturing Constants (P3009).</td>
</tr>
<tr>
<td><strong>QUALITY MANAGEMENT:</strong></td>
<td></td>
</tr>
<tr>
<td>36. Enter '1' to print Manufacturing Specifications.</td>
<td></td>
</tr>
<tr>
<td>37. Enter the version of the Manufacturing Specifications print program to call (P37470).</td>
<td>If left blank, 'ZJDE0001' will be used.</td>
</tr>
<tr>
<td><strong>PHANTOM OPERATION SEQUENCE NUMBER:</strong></td>
<td></td>
</tr>
<tr>
<td>38. Enter a '1' to default the phantom's (parent) operation sequence for the components on the parts list.</td>
<td>If left blank, the component's operation sequence will be used.</td>
</tr>
<tr>
<td><strong>WORK ORDER START DATE UPDATE:</strong></td>
<td></td>
</tr>
<tr>
<td>39. Enter a '1' to update the Work order Start Date with the Start Date of the first routing operation for variable lead time.</td>
<td>If left blank, no updating will be performed</td>
</tr>
</tbody>
</table>
LOT EXPIRATION DATE:
40. Select the date that will be used to determine the eligibility of lot/serial numbered components. Only lots with effective dates less than or equal to the date specified AND expiration dates (based on the item's commitment date method) greater than or equal to the date specified will be considered.
   ' ' = Parts list required date (default)
   '1' = Work order start date
   '2' = Work order requested (completion) date

AUTOMATIC LOT NUMBER GENERATION:
41. Enter a '1' to automatically generate a lot number upon co/by products creation for items with a lot process type of 1 or 2.

Work Order Time Entry (P311221)

DISPLAY INFORMATION:
1. Enter a '1' for the screen to be displayed in Order Number format.
   If left blank, the screen will be displayed in Employee format.

UPDATE INFORMATION:
2. Enter the document type associated with shop floor activity.

EDIT INFORMATION:
3. Enter the status code beyond which shop floor activity cannot be entered.
4. Enter a '1' to verify that, for a given operation, the total of the quantity completed plus scrapped does not exceed the Quantity At Operation.
5. Enter a '1' to prevent the employee rate from being written to the screen.
<table>
<thead>
<tr>
<th>Processing Option</th>
<th>Processing Options Requiring Further Description</th>
</tr>
</thead>
</table>
| QUALITY MANAGEMENT: | 6. Enter the version of Test Results Revisions (P3711) to call.  
If left blank, 'ZJDE0002' will be used. |
| DREAM WRITER VERSIONS: | 7. Scheduling Workbench (P31225)  
8. Production Status (P31226) |
|                   | Enter the version for each program.  
If left blank, 'ZJDE0001' will be used. |
6 Appendices
Appendix A – Functional Servers

About Functional Servers

Several JD Edwards World programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values
- Field edits and valid values
- Error processing
- Relationships between fields or applications

The advantages of a functional server are:

- It reduces maintenance of entry programs because edit rules reside in one central location.
- You can standardize documents across all applications because you create them using the same business rules.
- Generally, the user interface (appearance and interaction) of a form is now separate from how a program works.

To set up business rules for an entry program

The steps for setting up business rules for an entry program are:

1. Create a DREAM Writer version for a specific functional server program (for example, XT0411Z1 for voucher entry).
2. Set the processing options within the version according to your company requirements.
3. Specify the version you want the entry program to use in the processing options for that entry program.

You can have all your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. JD Edwards World provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.

Caution: Only the person responsible for system-wide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see the Technical Foundation Guide.
Example: Voucher Processing Functional Server

The following graphic shows the programs that use the voucher processing functional server. JD Edwards World provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.
Index

Miscellaneous

*RANGE
revising, 2-59, 2-83

*VALUE
revising, 2-58

A

About
configuration management tables, 2-91, 2-95
configured items, 4-1
configured items in distribution systems, 4-15
configured items in manufacturing systems, 4-11
sales orders, 3-1
setup, 2-1
Advanced Rule Functions form (P329301), 2-83
Advanced rules
setting up, 2-83
AIR Segment Where Used form (P329301), 2-86
Analyzing your configured item, 1-6
Assembly Inclusion form (P3293), 2-73, 2-104
Assembly inclusion rules, 1-6
advanced, 2-70
linking a table to, 2-103
locating, 2-84
processing, 2-81
setting up, 2-69, 2-73
Associated text
working with, 3-14
Associated Text Window form (V401), 3-14
ATO Specification Text Format form (P32941), 3-4
Availability, 4-19

B

Base Price Revisions form (P4106), 2-24
Branch/plant information, 2-8

C

Checking availability, 4-19
Component information
locating, 2-85
Component Where Used form (P32930), 2-85
Configuration Management
constants, 2-2
overview, 1-1

setup, 2-1
Configuration Management tables, 2-91, 2-95
calculated value (type C), 2-91, 2-95
deleting a table value, 2-99
pricing (type X), 2-91, 2-95
quantity (types P and Q), 2-91, 2-95
returning multiple values, 2-100
setting up, 2-96
Configurator Constants form (P3209), 2-32
Configurator Custom Messages form (P0016), 2-61
Configurator Rules form (P3292W1), 3-13
Configured Item Cross Reference form (P3282), 2-99
Configured item cross-reference, 2-99
setting up, 2-99
Configured Item Segments form (P3291), 2-17, 2-37
Configured Item Specifications form (P3294), 3-7, 3-16
Configured items, 1-5, 4-15
inventory, 4-15
working with, 4-1
Configured string, 1-5
Configured string history
generating, 4-7
reviewing, 4-7, 4-8
working with, 4-7
Configured String History form (P3296), 3-5, 3-8, 3-11
Configured String History form (P32961), 4-8
Constants
setting up, 2-31
Converting
sales quote to sales order, 3-17
Copying
assembly inclusion rules, 2-84
cross segment editing rules, 2-59
Cross Segment Editing form (P3292), 2-53
Cross Segment Where Used form (P32920), 2-62
Cross-reference
generic, 2-100
Cross-segment editing rules, 1-5
reviewing, 2-61
setting up, 2-51
Cross-segment logic, 2-52

D

Define Item Price Group form (P4092), 2-26, 2-27
Define Subsystem form (P40105), 4-4
Discounting information
setting up, 2-27
Distribution information
setting up, 2-19
Distribution systems
configured items, 4-15

E
Enter/Change Routing form (P3003), 2-12
Entering
a sales order in assisted mode, 3-6
a sales order in assisted prompt mode, 3-9
a sales order in text mode, 3-4
branch/plant information, 2-8
custom error message, 2-61
desc Description setting up, 2-27
distribution information
setting up, 2-19
distribution systems
configured items, 4-15

F
Features, 1-6
Forms
Advanced Rule Functions, 2-83
AIR Segment Where Used, 2-86
Assembly Inclusion, 2-73, 2-104
Associated Text window, 3-14
ATO Specification Text Format, 3-4
Base Price Revisions, 2-24
Component Where Used, 2-85
Configurator Constants, 2-32
Configurator Custom Messages, 2-61
Configurator Rules, 3-13
Configured Item Cross Reference, 2-99
Configured Item Segments, 2-17, 2-37
Configured Item Specification, 3-7, 3-16
Configured String History, 3-5, 3-8, 3-11, 4-8
cross Segment Editing, 2-53
cross Segment Where used, 2-62
define Item Price Groups, 2-26, 2-27
define Subsystem, 4-4
define system, 1-4
enter Change Routing, 2-12
Inventory Pricing Rules, 2-28
Item Branch/Plant Information, 2-8
Item Master Information, 2-4
Multi-level Product Selection, 3-16
Order Activity Rules, 2-22
Order Line Types, 2-20
Plant Manufacturing Data, 2-9
Rules Copy Window, 2-60, 2-84
Sales Order Entry, 1-10, 1-11, 3-4, 3-7, 3-9, 3-10, 3-15, 3-17
Segment UDC Where Used, 2-44
Segment Value Selection, 3-8
table Definition, 2-97
table Keys, 2-101
table Values, 2-102
User Defined Code Revisions, 2-42, 2-97
User Defined Code Types, 2-43
Value Selection, 2-58, 2-59, 2-82, 2-83

G
Generating the configured string history, 4-7
Graphic
entering a sales order for a forklift, 1-8
ERPx, 1-4
menus, 1-8
system integration, 1-2
table key, 2-92

H
Hours
reviewing, 4-11

I
Inventory Pricing Rules form (P4271), 2-28
Invoices
working with, 4-24
Item and customer information
entering, 3-4, 3-7, 3-9
Index

Item Branch/Plant Information form (P41026), 2-8
Item information
setting up, 2-3
Item master information
entering, 2-3
Item Master Information form (P4101), 2-4

L
Leadtimes
calculating, 4-5
Line types
setting up, 2-20
Linking a table to an assembly inclusion rule, 2-103
Locating
assembly inclusion rules, 2-84
component information, 2-85
segment information, 2-44, 2-86
Logic statements, 2-51, 2-70

M
Manufacturing accounting
working with, 4-13
Manufacturing systems
configured items, 4-11
Menus, 1-8
Modes
assisted, 3-3
assisted prompt, 3-3
text, 3-3
Multi-level configured item, 1-5
Multi-level Product Selection form (P3298), 3-16

O
Order activity rules
setting up, 2-21
Order Activity Rules form (P40204), 2-22
Order Line Types form (P40205), 2-20
Overview
ERPx, 1-4

P
Pick lists
working with, 4-22
Plant Manufacturing Data form (P41027), 2-9
Previously ordered configured item
entering, 3-5, 3-8, 3-10
Price information
setting up, 2-23
Pricing groups
setting up, 2-25
Printing table information, 2-104
Processing work orders, 4-3
Product costing
working with, 4-13
Programs and IDs
P00041 (user defined code types), 2-43
P00051 (user defined code revisions), 2-42, 2-97
P0016 (configurator custom messages), 2-61
P3003 (enter/change routing), 2-12
P3209 (configurator constants), 2-32
P3281 (table definition), 2-97
P3282 (configured item cross reference), 2-99
P3283 (table keys), 2-101
P32831 (table values), 2-102
P3291 (configured item segments), 2-17, 2-37
P32910 (segment UDC where used), 2-44
P3292 (cross segment editing), 2-53
P32920 (cross segment where used), 2-62
P32921 (value selection), 2-58, 2-59, 2-82, 2-83
P3292W1 (configurator rules), 3-13
P3293 (assembly inclusion), 2-73, 2-104
P32930 (component where used), 2-85
P329301 (AIR segment where used), 2-86
P32931 (advanced rule functions), 2-83
P3294 (configured item specifications), 3-7, 3-16
P32941 (ATO specification text format), 3-4
P3295 (segment value selection), 3-8
P3296 (configured string history), 3-5, 3-8, 3-11
P32961 (configured string history), 4-8
P3297 (rules copy window), 2-60, 2-84
P3298 (multi-level product selection), 3-16
P40105 (define subsystem), 4-4
P40204 (order activity rules), 2-22
P40205 (order line types), 2-20
P4092 (define item price groups), 2-26, 2-27
P4101 (item master information), 2-4
P41026 (item branch/plant information), 2-8
P41027 (plant manufacturing data), 2-9
P4106 (base price revisions), 2-24
P42111 (sales order entry), 1-10, 1-11, 3-4, 3-7, 3-9, 3-10, 3-15, 3-17
P4271 (inventory pricing rules), 2-28
V401 (associated text window), 3-14

R
Ranges
setting up, 2-59, 2-82
Reports
Invoice, 4-25
Pick Lists, 4-23
Segment Rules, 2-107, 2-108, 2-109
Reviewing
configured string history, 4-7
cross segment editing rules, 2-61
hours, 4-11
Reviewing quantities, 4-11
Routings
entering, 2-12
Rules
calculated segment, 2-60
calculation (c), 2-69
component part (p), 2-69
conditional
  setting up, 2-74
generic branch/plants set up, 2-60
multi-level configured items, 2-60
pricing (x), 2-69
routing (r), 2-69
separating, 2-60
unconditional
  to set up, 2-73
work order component part (q), 2-69
Rules Copy Window form (P3297), 2-60, 2-84

S
Sales order, 3-1
  assisted mode
    entering, 3-6
  assisted prompt mode
    entering, 3-9
  revising, 3-16, 4-4
text mode
  entering, 3-4
  updating, 4-5
Sales order entry
  setting up line types, 2-19
Sales Order Entry form (P42111), 1-10, 1-11, 3-4, 3-7, 3-9, 3-10, 3-15, 3-17
Sales quotes
  configured items, 3-17
  converting to a sales order, 3-17
Segment, 1-5
Segment information
  locating, 2-86
Segment UDC Where Used form (P32910), 2-44
Segment Value Selection form (P3295), 3-8
Segment Values
  Comparing, 2-45
Segments
  calculated, 2-36
  locating, 2-44
  optional, 2-35
  required, 2-35
  setting up, 2-35, 2-36
  setting up values, 2-42
Setting up
  a segment, 2-36
  assembly inclusion rules, 2-73
  configured item cross-reference, 2-99
  constants, 2-31
cross-segment editing rules, 2-51
cross-segment logic, 2-52
custom error messages, 2-61
discounting information, 2-27
distribution information, 2-19
  item information, 2-3
  line types, 2-19
  logic statements in cross-segment editing rules, 2-51
  order activity rules, 2-21
  price information, 2-3
  pricing groups, 2-25
  segments, 2-35
  table dimensions, 2-96
  table values, 2-100
  tables, 2-96
  user defined codes, 2-41
Shipments
  working with, 4-23
Smart Parts
  About, 2-15
  Standard costs
    updating, 4-5
Subsystem
  starting, 4-5
  working with, 4-4
System integration, 1-2

T
Table Definition form (P3281), 2-97
Table dimensions
  setting up, 2-96
Table information
  printing, 2-104
Table Keys form (P3283), 2-101
Table values
  setting up, 2-100
Table Values form (P32831), 2-102
Tables
  Assembly Inclusion Rules (F3293), 1-7
  Base Price (F4106), 1-8
  Branch/Plant (F4102), 1-7
  Configurator Constants (F3209), 1-7
  Configured Item Segments (F3291), 1-7
  Configured Items Rules Table Cross Reference (F3282), 1-7
  Configured String History (F3294), 1-7
  Configured String Master (F32941), 1-7
  Configured String Segment (F32942), 1-7
  Cost Ledger (F4102), 1-8
  Cross Segment Editing Rules (F3292), 1-7
  Item Location (F41021), 1-8
  Item Master (F4101), 1-7
  Range Detail (F32922), 1-7
  Rules Table Definition (F3281), 1-7
  Rules Table Value Definition (F32821), 1-7
  Sales Order Detail (F4211), 1-8
  Sales Order Header (F4201), 1-8
  Table Data (F3283), 1-7
  Values Detail (F32921), 1-7
Terms and concepts, 1-5
Training class case study, 1-8
U

UDC, See User Defined Code
User Defined Code, See UDC
User Defined Code Revisions form (P00051), 2-42, 2-97
User Defined Code Types form (P00041), 2-43
User Defined Codes (UDC)
  setting up, 2-41

V

Value Selection form (P32921), 2-58, 2-59, 2-82, 2-83
Values
  setting up, 2-57, 2-81

W

Work order
  recosting, 4-4
  reprocessing, 4-4
Work order completions, 4-13
Work orders
  processing, 4-3
Working with
  associated text, 3-14
  configured item inventory, 4-15
  configured string history, 4-7
  error messages, 3-13
  invoices, 4-24
  manufacturing accounting, 4-13
  pick lists, 4-22
  shipments, 4-23
  work order completions, 4-13
Working with sales quotes, 3-17